



# **CONNECTING INNOVATION, EDUCATION AND ECONOMICS**

————— **Lorina Culic, Ioan Hosu** —————

**Innovation,  
Entrepreneurship and Society Conference  
Babeş-Bolyai University, Cluj-Napoca  
15th of July, 2021**

**Presa Universitară Clujeană**



Innovation, Entrepreneurship and Society Conference  
Second Edition  
15<sup>th</sup> of July, 2021  
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PRESA UNIVERSITARĂ CLUJEANĂ  
2022



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## Foreword

Organised on 15<sup>th</sup> of July 2021 by the *Communication and Social Innovation Research Center (CORE)*, Faculty of Political, Administrative and Communication Sciences, in partnership with the *Business Informatics Research Centre (CCIE)*, Faculty of Economics and Business Administration, Babeş-Bolyai University, Cluj-Napoca, the conference "*Innovation, Entrepreneurship and Society*", represented an opportunity for doctoral students and young researchers to present their research directions in a dialogue open to different experiences and topics of interest, in order to engage participants in an exercise of high academic prestige.

The Innovation, Entrepreneurship and Society Conference, on its second edition, was a continuation of the conference organized in 2020 by the *Communication and Social Innovation Research Center* on the topic of entrepreneurship and social innovation, an event that aimed to support students in their endeavor to develop theoretical and empirical valuable research.

The volume, *Connecting Innovation, Education and Economics*, represents the conference outcome and embodies the authors effort delivered as a number of 32 articles, structured in three sections, that include both research articles or theoretical perspectives, elaborated in Romanian or in English. The first section, entitled *Economy, Finance and Public Administration*, includes a variety of themes that come together under a common dome. The articles vary in approach and scope of analysis: from analysis focused on the technological development and the advantages for the private and public environment, to the analysis of digital tools useful for the community, to the analysis of the emerging entrepreneurial environment, or analysis of the Covid-19 impact in different fields. The second section, *Education, Inclusiveness and Learning*, features articles on education and educational processes, affected by the digitization of educational platforms, bringing benefits both for teachers and students, or analysis centered on student's skills and the role of self-esteem in sports contexts, or approaches centered on consumers and their interaction with digital platforms.

Lastly, the *History and Society* section, encompasses diverse analysis from the evolution of territorial areas, to case studies on the presentation of gravestones, to contemporary analysis of either civic legislation or governing coalitions, or political-religious decisions. All of the authors of the current volume assume their compliance with the academic norms and declare their work to be original.

As editors, we hope that this conference and this volume, *Connecting Innovation, Education and Economics*, will encourage and enhance doctoral and young practitioners research skills and their interest in observing, capturing and analyzing societal trends. We would like to thank all the authors for their important and most valuable contribution!

**The Editors**

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Section 1  
**ECONOMY, FINANCE & PUBLIC ADMINISTRATION**

**EFFICIENT EVALUATION OF INNOVATIVENESS AND  
INNOVATION PERFORMANCES IN IT COMPANIES  
A PRAGMATIC, CONTEMPORARY, AND COMPREHENSIVE  
MEASUREMENT FRAMEWORK**

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**Abstract:** *This theoretical paper aggregates a wide volume of research notes to describe a comprehensive, practical and effective measurement framework helping managers in IT companies to correctly evaluate and understand the level of innovativeness and the innovative performance of their companies. Recent academic literature indicates that the orientation towards various measurement approaches and types, multiple categories of respondents, multiple references and scales of evaluation, and a diversity of perspectives (both quantitative and qualitative) is able to provide more clarity, a profound understanding of the matter and strong evaluation relevance, for further highly productive business decision-making. Some traditional innovation measures like number of patents, number of new ideas or volume of new products are demonstrated as irrelevant in the specific context of the IT industry, whereas parameters expressing the novelty degree of the new products, processes or services are essential in making the difference between minor incremental changes and market-creating radical innovations.*

**Keywords:** Innovation management, innovation performance, IT companies, Information Technology

## **Introduction**

Firms naturally consider performance measurement of critical importance, to understand the results of their work and to further improve their strategies and tactics. Organizations use a variety of measures to practically assess the value they produce, such as profitability, market capitalization, new product introduction and patents. According to Saunila & Ukko (2013; 2014) “innovation performance measurement cannot be separated from other performance measurement practices and should be a part of the business performance measurement system, comprising various financial and non-financial measures”. Moreover, innovation performance measurement is mostly needed to assist decision making during the early phases of innovation development (Haldma et al., 2012; Saunila, 2017).

Despite its importance, the organizations’ innovativeness (the capability level of producing innovation, a measurement focused on processes) and innovation performance (measures focused on products and their specific impact on sales, profitability, ROI and other business results) does not benefit yet of a universal, standardized, objective, generally accepted and applied method of evaluation. Numerous studies have explored the innovation performance measures, and many researchers have long acknowledged that it is difficult to choose suitable indicators to measure the innovation performance of firms (Romijn & Albaladejo, 2002).

Adams et al. (2006) observed that measurement of innovation performance does not appear to take place routinely within management practice in organizations, but this field has received increasing attention within the last two decades and tends to become a structured process instead of a rudimentary and subjective evaluation strategy (Bititci et al., 2012).

The Information Technology sector is one of the best performing in innovating the contemporary economy and also one of the most recently developed areas, so it has not yet built a comprehensive and coherent set of methods, techniques and practices to help management assess innovation capacity and performance. This paper aims to provide a set of relevant and efficient parameters, from which managers can choose the most appropriate evaluation elements for the type, size, specific business model of the organization, specific business and market which it addresses. By correctly and longitudinally measuring their innovative capabilities and outputs, organizations and managers will be able to deeply understand the impact that creativity and organizational capacity to produce new ideas and products can have on concrete business results, and will make correct and solid decisions regarding medium- and long-term business development.

### **Theoretical framework**

A large spectrum of methods and instruments measuring organizational innovativeness is mentioned in the academic literature, their variety and complexity being increased by the specific differences between industries and the research approaches. In the academic literature, four areas of innovation performance measurement can be found: those focusing on inputs, process, outputs, and outcomes. Inputs refer to the resources provided for innovation (personnel, funds, equipment, ideas); Process measures cover the phenomena occurring between the inputs and outputs of innovation and mainly refer to time, cost, quality, and project's progress; Outputs are the direct results of innovation activities (new products, new services, new knowledge) and reflect the outcomes, namely the performance implications of innovation: market success, revenue, profit, market share, customer satisfaction (Janssen et al., 2011; Saunila, 2017). When referring to innovativeness, this paper will focus on inputs and processes, while innovations' outputs and outcomes will conceptually cover the innovation performance.

Using individual output indicators (as patent numbers and rates, patent quotes, number of new products, percentage of sales with innovations and others) is problematic, because their nature and value is highly heterogeneous, not all innovations are patented, not all patents become innovations and the orientation towards patents varies greatly depending on firm size and sector. These relatively objective numbers are not enough to precisely describe the practical degree of innovativeness of an organization, because they partially miss or don't address a large spectrum of parameters, as the degree of novelty, the long-term value of the innovation exploitation, the second-level impact of the innovation for the customers that benefit of the innovative output, the larger spectrum of applications of the innovation, the potential commercial value of the patent if sold or the impact in the company market value. Fischer et al. (2014) explain that the number of patents is not considered as a significant criterion of performance for the Software industry, because product cycles are very short, companies are generally small-sized, IT products are modular and are packed in a huge number of versions through customization, and intellectual property is generally protected through internal methods of software security, not through patents. Moreover, business strategies in IT can be different: some companies can focus on a single product, while others can develop large series of products, so the number of new products is often irrelevant or tricky for measuring business results.

### ***Established innovation measurement models, compatible to the IT sector***

One of the most cited and structured frameworks to collect firm-level data on innovation activities is the so-called “Oslo Manual”, developed by OECD (2005). The “Oslo methodology” sets international standards for measuring innovativeness and offers a specific set of guidelines for innovation-related surveys, covering a large spectrum of dimensions related to the innovation activities (Evangelista et al., 2001; Erdil et al., 2004). In this complex instrument, the innovation typology is extended: apart from product and process innovations, non-technological innovations (i.e. organizational and marketing) have been added and are treated equally as the aforementioned (Roszko-Wójtowicz & Białek, 2016).

Six are the major areas of investigation of the Oslo Manual:

- The typology of the innovation (process / product / organizational / marketing)
- The amount of resources devoted to innovation activities;
- The specific strategies implemented by firms;
- The channels firms acquire and exchange technological information;
- The existence of technological flows within firms;
- The effect of innovation activities on sales and exports;

Out of these six different dimensions investigating organizational innovation, the effect of innovation on national or export sales can be retained as measures of performance seen as outcomes of the creative initiatives. The sales revenue from product innovations occurred in an observation period of the previous one to three years is recommended as a valid and strong innovation performance measurement parameter by the *Oslo Manual* (OECD, 2005) and applied in a large number of recent well-cited studies (Alegre & Chiva, 2008; Lopez-Cabrales et al., 2009; Sofka & Grimpe, 2010; Carlsson et al., 2011; Alegre et al., 2013; Arundel et al., 2019). This indicator is generally calculated based on organizations’ top managers’ self-evaluation and expressed in surveys on 5- or 7-point Likert scales.

Mairesse & Mohnen (2002) propose a strictly financial perspective on innovativeness, describe an accounting-based framework for innovation, and explain the intensity of innovation through a sales-weighted measure of innovation: the share of sales of the innovative products in the total value of the company sales. Innovation performance appears in a large body of academic literature as the percentage of total annual sales that consist of new or substantially improved products introduced over the last three years or as other financially-related parameters, as profitability, Return on Investment, return on assets or market share (Judge & Douglas, 1998; He & Wong, 2004; Cassiman & Veugelers, 2006; Fosfuri & Tribó, 2008; Zeng et al., 2010).

Companies’ income represents the performance factor taken into consideration by Kafouros et al. (2008) as well, but these scholars prefer a deeper and theoretically more objective level of analysis, connecting the revenues with the number of employees and expressing the performance as sales revenue per employee, which is at the same time a measure of labor productivity, difficult to be manipulated in manipulated financial reports. The dependent variable in the study of Tsai (2009) is product innovation performance, which is measured as well by innovative sales productivity per employee (the ratio of sales attributed to new products divided by the total number of employees). Kafouros et al. (2008) criticize the use of firm’s profitability as performance measurement factor, and consider that firms’ profitability is highly volatile and sometimes negative. Moreover, profitability has problems associated with the handling of royalties, management fees, and accounting standards, and the time lag between innovation and profitability is likely to be too long to allow a correct evaluation of the innovation’s impact.

To measure a company’s innovativeness, Romijn & Albaladejo (2002) improve the model created at Cambridge by Cosh et al. (2002) and affirm that the degree of novelty of the innovation should be taken as a strongly relevant factor. This factor is qualitative and subjective



(expressed in surveys or interviews) and assigns a score for the degree of newness of the firm's products launched within the last three years: 1 – “not innovative at all”; 2 – “same or similar to competitors”; 3 – improved version of existing similar innovations in the industry; 4 – new to the industry; to 5 – “new to the world”. A study of Baer & Frese (2003) uses a similar model: respondents were asked to estimate on a 5-point scale ranging from 1 (no change at all) to 5 (a lot of change) the degree of change that had taken place in their company over the last two years with respect to each product or process innovation. A similar approach is presented by other studies (Prajogo & Ahmed, 2006; Prajogo & Suhal, 2006), measuring the level of newness of new products with a 5-point Likert scale from 1 - Worst in industry, - Best in industry).

Fischer et al. (2014) prefer a bidimensional approach, separately questioning incremental and radical innovativeness characteristics. For incremental improvements in products, respectively in processes, company representatives are asked to simply confirm/infirm if they produce such innovations and to express their number. To measure the newness of the innovation, Fischer et al. (2014) slightly improved the model of Romijn & Albaladejo (2002). Six levels of radical innovation (based on consistency and market impact) scoring from 0 to 5, are used to specifically distinguish the degree of newness obtained by the companies in their study sample: no major innovation at all (score of 0); same or very similar innovation adopted by competitors (score of 1); similar innovation to the ones adopted by other firms in the same industry but the firm's innovation differs in identifiable ways from innovations of other firms. (score of 2); similar innovation to the ones adopted in other industries (score of 3); innovation fundamentally new to the firm (score of 4); innovation fundamentally new to the market (score of 5). Later on, Lisbona et al. (2020) validate this model and use the same six-levels scale to evaluate the innovation quality and complexity, via questionnaires addressed to managers, as a company's self-evaluation.

In the Composite Innovation Index developed by Carayannis & Provan (2008) we find a similar but very ambitious approach that clearly separates incremental and radical novelty and focuses on the second only. The Newness of innovation is measured on five levels: 1 - New to the firm; 2 - New to the industry – national; 3 - New to the industry – international; 4 - Innovation has set a new industry standard; 5 - Innovation cannot be imitated.

Pallas et al. (2013) build on previous academic research and propose two scales to evaluate the success of the organizational innovativeness: Innovation Performance and Business Performance. Both are measured via surveys addressing companies' top managers, all items being measured Likert scales. Six factors inspired by Cooper & Kleinschmidt (1995) are designed to measure a company's innovation performance (impact in sales; impact in annual profit; profitability of the innovation portfolio; innovation profitability compared to competitors; achievement of sales targets; achievement of profit objectives). The business performance scale has four items (Profitability; Return on Investment; Return on Sales; Reaching financial goals) and measures a company's financial success in relation to that of its competitors and is adapted from Vorhies & Morgan (2005). Because business performance is generally the result of a more complex set of internal and external factors and the exclusive or explicit impact of innovation cannot be calculated and demonstrated, we consider business performance as outside the purpose of this paper.

Calik & Bardudeen (2016) propose two new measurement factors: increase in innovation expenditure, and introduction of new products or processes, measured through surveys, respondents evaluating an affirmation on a five-point Likert scale. The innovation performance factor calculated by Inkpen et al. (2015) is based on five items (products and services; production methods and processes; management practices; marketing practices; business models) and relies on previous research work made by Weerawardena (2003). The respondents were requested to compare their company's success to the competitors', by using a 5-point Likert scale. For Ferraresi et al. (2012), the impact of innovation is measured via five

self-reported items (evaluations made by managers and employees). Two indicators of innovativeness focus on the processes: agility of internal processes and reduction in response time to market changes, as measures of organizational effectiveness. The three related to innovation performance are: percentage of new product sales to total sales, market share of new products, and return on investment in new products (ROI).

Parida et al. (2017) use a perceived measurement of firms' innovative performance inspired from Walter et al. (2006), where respondents rate their results in relation to their competitors, on four parameters: Ability to develop new methods and processes and Ability to develop new products and services (for innovativeness), respectively Sales growth on established markets and Market growth on new market (for innovation performance). This study of Hung et al. (2011) measures innovation impact using 16 items adapted from previous similar research (Baker & Sinkula, 1999; Prajogo et al., 2004) and 5-point Likert scales. Eleven items address the processual aspects of innovativeness (speed of R&D; speed of production improvement; speed of logistic innovation; impact of R&D in production; production customization; products innovativeness; use of latest technologies; use of modern HR practices; job design innovation; organizational structure flexibility; patent registrations), while other five items target the organizational innovative performance (competitive advantage; profitability, decrease of unit cost of production; turnover, employee productivity).

### ***The need for multiple sources, multiple scales and various perspectives***

Saunila (2017) has reported significant differences between managers and employees regarding innovation performance measurement, in part, explained by the difficulties communicating the results and converting these results into an understandable and practical form. This understanding gap between managers and employees brings the opportunity of moving from performance measurement to performance evaluation, when referring to innovation. As Bititci et al. (2012) have stated, the evaluation not measurement of performance could provide a superior level of trust, which is mandatory for a good climate for innovation.

To reduce the managers-employees perception gap and to reduce possible biases from managers' self-reporting, a double take in data collection could be a good idea, by addressing the same items and factors in the questionnaires addressed to employees and, separately, to companies' top managers and verifying the official perspective with the collective perception collected from the organizations' employees. Fischer et al. (2014) argue that by distributing the questionnaire to a larger number of respondents in the same firm a more realistic evaluation of the innovativeness level can be revealed by avoiding or at least reducing biases, compared to other methods that count on subjective individual evaluations or on objective but incomplete data as the number of patents.

A mix between objective statistical or financial data and subjective perceptions captured via surveys and interviews appears as a comprehensive evaluation tool in the majority of the academic articles published within the last decades. As a consequence, using simultaneously a quantitative and qualitative approach, involving multiple or composite indicators in determining a firm's innovativeness provides the advantage of a more systematic, realistic and encompassing approach, while a universal composite indicator is still a desirable yet untouched objective (Carayannis & Provan, 2008).

At the same time, a superior level of objectivity and evaluation data credibility could be reached by asking respondents to use multiple scales of evaluation: by reporting their results in absolute numbers, by comparing their perceived performance to the results of their market rivals or by comparing their concrete performances against the organization's declared objectives.

By evaluating the company's innovation performance against the major competitor in the industry via perceptual measurements in surveys, the research minimizes, as far as possible, the bias of subjective answers or the industry effect (Judge & Douglas, 1998; Prajogo & Sohal,

2006). The comparison against the major competitor offers a relatively precise and tangible system of reference, while the use of an absolute scaling could lead to a more biased and inappropriate evaluation by respondents (Kraft, 1990; Prajogo & Ahmed, 2006). De Luca & Atuahene-Gima (2007) provide a system of performance measurement that asks company officials to evaluate various achieved parameters (market share, sales, return on assets, return on investment, profitability) in direct relationship with the stated objectives.

### Conclusions, managerial and practical implications

As a synthetic result of all this wide academic background, to correctly evaluate and coherently measure the innovative performance and the business performance of the IT companies, a complex set of perception-based measures and parameters, extracted via surveys applied both on employees and top managers is defined and listed in the table below. The items in the survey questionnaires should ask relevant respondents to provide both evaluations based on absolute numbers and personal perceptions related to specific references (company's stated objectives, competitors' performances). All measurement factors are backed by academic research literature and are selected by evaluating their relevance for the addressed industry.

To summarize, the most relevant and impactful factors that can be taken into consideration to evaluate the organizations' innovativeness are those presented in Table 1, while the factors that measure the innovative performance of the organizations are listed in Table 2.

**Table 1: Measures of Organizational Innovativeness**

<b>Innovativeness Factor</b>	<b>Example of measurement item</b>	<b>Respondent &amp; Reference type:</b>	<b>References</b>
Compared innovativeness	This is the most innovative company I have ever worked for/with	Employees, managers Options: (Yes / No / Not Applied & I don't know)	Fischer et al., 2014;
Strategic focus on innovation	This company is seriously focused on innovation.	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	Pallas et al., 2013
Speed of R&D processes	Please evaluate the speed of the Research & Development processes in this company.	Employees, managers, other stakeholders; -Personal evaluation (Likert scale) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Prajogo & Ahmed, 2006; Prajogo & Suhal, 2006
Speed to the market of the new products (Alternative: reduction in response time to market changes)	Please evaluate the speed to the market of the new products of this company.	Employees, managers, other stakeholders; -Personal evaluation (Likert scale) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Prajogo & Ahmed, 2006; Prajogo & Suhal, 2006 Ferraresi et al. (2012)
Encouragement of initiative to implement ideas	In this company, the initiative for implementing new ideas is actively encouraged and supported.	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	OECD, 2005; Fischer et al., 2014;
Effective adoption of new ideas; (Alternative: Agility of internal processes);	A large proportion of the new ideas generated in the company is practically implemented in our work and products.	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	OECD, 2005; Fischer et al., 2014; Ferraresi et al., 2012;

(Alternative: Ability to develop new products and services);			Parida et al., 2017;
Technological novelty (Alternative: Ability to develop new methods and processes)	We use the latest technological innovations and methodologies in our new product development activities.	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	Prajogo & Ahmed, 2006; Prajogo & Suhail, 2006; Fischer et al., 2014; Parida et al., 2017;
Degree of novelty of the new products	Please evaluate the level of innovation of your organization. Select the option that best describes the innovative value of your products and services	Employees, managers, other stakeholders; - No major innovation at all. - Same or very similar innovation applied by our competitors. - Similar innovation to the ones applied by other firms in the same industry, but the firm's innovation differs in identifiable ways from innovations of other firms. - Similar innovation to the ones applied in other industries - The innovation we realize is fundamentally new to the firm. - The innovation we generate is fundamentally new to the market	Romijn & Albaladejo, 2002; Fischer et al., 2014; Lisbona et al., 2020
Degree of radical novelty of the new products	Please evaluate the level of novelty for the innovation of your organization. Select the option that best describes the innovative value of your products and services	Employees, managers, other stakeholders; - New to the firm; - New to the industry – national; - New to the industry – international; - Innovation has set a new industry standard; - Innovation cannot be imitated.	Carayannis & Provan, 2008;
Increase in innovation expenditure	Over the past few years, our company has consistently increased expenditure for product or process innovations	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	Calik & Bardudeen, 2016
Introduction of new products or processes	Over the past few years, our company has consistently developed and commercialized new products or services	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	Calik & Bardudeen, 2016;
Other measurement indicators related to process, as suggested by Hung et al. (2011)	Speed of production improvement; speed of logistic innovation; impact of R&D in production; production customization; use of modern HR practices; job design innovation; organizational structure flexibility;	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree	Hung et al., 2011;

**Table 2: Measures of Innovation Performance**

<b>Innovation Performance Factor</b>	<b>Example of measurement item</b>	<b>Respondents &amp; Reference type:</b>	<b>References</b>
New products' turnover in total turnover	Please evaluate the new products' turnover in total turnover	Employees, managers, other stakeholders; -Absolute numbers (percentages) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	OECD, 2005; Carlsson et al., 2011; Ferraresi et al., 2012; Alegre et al., 2013; Arundel et al., 2019; Ferraresi et al., 2012;
New products' turnover per employee,	Please evaluate the new products' turnover per employee	Employees, managers, other stakeholders; -Absolute numbers -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Kafourous et al., 2008; Tsai, 2009;
Increase of competitive advantage in the market due to innovation	Please evaluate the increase of your company's competitive advantage in the market due to innovation	Employees, managers, other stakeholders; -Absolute numbers (percentage) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Hung et al., 2011;
Increase of profitability due to innovation	Please evaluate the increase of your company's profitability due to innovation	Employees, managers, other stakeholders; -Absolute numbers (percentage) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Pallas et al., 2013;
Increase of turnover due to innovation; (Alternative: Sales growth on established markets);	Please evaluate the increase of your company's turnover due to innovation	Employees, managers, other stakeholders; -Absolute numbers (percentage) -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	OECD, 2005; Hung et al., 2011; Parida et al., 2017;
Achievement of market share objectives by new products (Alternative: Market growth on new markets);	The new products have achieved the stated market share objectives	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Baer & Frese, 2003; De Luca & Atuahene-Gima, 2007; Ferraresi et al., 2012; Pallas et al., 2013; Parida et al., 2017;
Achievement of sales revenue objectives by new products	The new products have achieved the predefined sales revenue objectives	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Baer & Frese, 2003; De Luca & Atuahene-Gima, 2007; Pallas et al., 2013;

Achievement of Return on Investment objectives by new products	The new products have achieved the stated Return on Investment objectives	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Baer & Frese, 2003; De Luca & Atuahene-Gima, 2007; Ferraresi et al., 2012; Pallas et al., 2013;
Achievement of profitability objectives by new products	The new products have achieved the predefined profitability objectives	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Baer & Frese, 2003; De Luca & Atuahene-Gima, 2007; Pallas et al., 2013;
Decrease of unit cost of production	The unit cost of production has significantly decreased	Employees, managers, other stakeholders; 5-point Likert scale, from 1 – strongly disagree, to 5 – strongly agree -Comparison against organization's objectives (Likert scale) -Comparison against organization's competitors (Likert scale)	Hung et al., 2011;

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# THE TWO FACETS OF TECHNOLOGY TRANSFER - FORMAL AND INFORMAL

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**Abstract:** *In addition to conducting research and disseminating knowledge through teaching and publishing, university scientists have long participated in the practical solution of problems in the socio-economic environment through technology transfer (TT). Due to this process, called technology transfer, new materials, equipment, knowledge, facilities or existing capacity developed within universities, become accessible to the general public through formal technology transfer mechanisms (licensing agreements, patents). The purpose of this paper is to obtain an overview of the path that the TT process has taken since the entry into force of the Bayh-Dole Law and the effects of this, the complementarity between formal and informal technology transfer. The methodology of this study is based on the review of the articles that approach the link between TT formal and informal.*

**Keywords:** technology transfer, Bayh-Dole Law, informal transfer channels, models of TT, technology transfer office, academic entrepreneurship.

## Introduction

University teaching has changed radically with the effects of the Bayh-Dole law. The United States has been and will be a source of inspiration for many countries in the field of technology transfer. Enacted on December 12, 1980, the Bayh-Dole Act created a uniform patent policy among the many federal agencies that fund research, enabling small businesses and non-profit organizations, including universities, to retain title to inventions made under federally-funded research programs.

The Bayh-Dole Act was especially instrumental in encouraging universities to participate in technology transfer activities: "together with amendments in 1984 and augmentation in 1986, this unlocked all the inventions and discoveries that had been made in laboratories throughout the United States with the help of taxpayers' money - The Economist (2002, edition).

To the two traditional roles: teaching and basic research was added the third mission, academic entrepreneurship. The entrepreneurial orientation of universities was also accentuated by the existence of technology transfer offices that had the role of marketing the results of researchers (Bradley, 2013; Link et al., 2007).

Technology transfer has been studied over time, especially in the context of university-industry connections. Too little research is aimed at identifying the conditions under which academics carry out formal or informal technology transfer activities. Too little research is aimed at identifying under what conditions academics perform formal or informal technology transfer activities. The collaboration of universities with the business environment encounters many difficulties, whose causes are related to mutual distrust, difficulties in accessing resources for innovation, differences in objectives, expectations, organizational cultures, calendars, lack of adequate link structures and especially a legislative framework instable.

In recent years, universities have made steady progress in their efforts to encourage technology transfer through collaboration with industry. The establishment of Technology

Transfer Offices (TTO) has become a routine to support the marketing of academic research. Many universities have restructured their research capacities more responsibly to local industry, creating specialized research units, joint ventures or interdisciplinary projects that are more receptive to industrial needs. Most researchers who have researched the transfer of university technology have explored institutions that have emerged to facilitate marketing such as TTOs, industrial-university cooperative research centers, science/research parks and incubators.

There are many ways to capitalize on the results obtained both by disseminating them as such and by transferring the experience gained to other projects. The success of the project may generate spontaneous or stimulated dissemination at local, regional or global level. The results in this context are the number of patents, the number of industry licenses, and the number of companies or indicators that are the subject of spin-off of changing employment or growth.

The relationship between university contributions to a variety of technology transfers production measures are not strictly deterministic and many universities operate below the effective production frontier level (Siegel et al., 1999; Thursby & Kemp, 2002).

Technology transfer involves social conventions and legal rights as well as economic interests. The new role of their universities as local engines of economic development imposes new demands on universities and universities to question the role of research universities in advanced economies.

However, the university-led economic development process takes a lot of time and patience, which is often outside the immediate demands of the political process (Hassink, 1997) considers that in many regions of Europe, the US and East Asia technology transfer infrastructures have been set up to support endogenous potential by encouraging the diffusion of new technologies from higher education institutes (HEIs) medium-sized enterprises (SMEs).

The objective of this work is to analyze the stage and how the technology transfer is done and determine how it is made.

## **Literature review**

According to Wahab (2012), a review of literature on technology transfer reveals that “technology transfer is a complex, difficult process even when it occurs across different functions within a single product division of a single company”. Moreover, “the term ‘technology’ itself is difficult to interpret, observe or evaluate, as argued by many scholars, this review attempts to provide in depth discussion and enhance understanding on these concepts from various perspectives, research background and disciplines” (Wahab et. al, 2012). University teaching has changed radically with the effects of the Bayh-Dole law, to the two traditional roles: basic teaching.

## **Definition of technology transfer terminology**

The definitions and concepts of technology transfer have been discussed in many different ways based on the disciplines of research and according to the purposes of the research (Bozeman, 2000; Gibson & Smilor, 1991) view technology transfer is often a chaotic, disorderly process involving groups and individuals who may hold different views about the value and potential use of the technology. According to them, technology often has no definitive meaning or value.

Researchers, developers, and users are likely to have different perceptions about the technology. The dynamic nature of technology has contributed to the existence of various definitions and concepts of technology through past technology transfer studies. Technology transfer is the process of transferring skills, knowledge, technologies, manufacturing methods, facilities between governments and universities, research units on the one hand and executive production or service units to ensure that scientific and technological developments are accessible to a wider range of users who can then further develop and exploit the technology in new products, processes, applications, materials or services. According to Samli (1985),

technology transfer is a "chain where technology is harnessed and implemented in beneficiary entities". A part of the Romanian authors interested in the technology transfer have concluded that the concept is directly linked to a large number of concepts, among which the most frequently encountered are: innovation, innovation, invention, entrepreneurship, technological change, technical transfer, research marketing, organizational learning, or absorption capacity (Salanță et al., 2018).

Teece defines the Transfer Technology like "process of sharing knowledge, machine, equipment, methods, techniques, process, and facilities with the aim of facilitating accessibility of scientific and technological developments from primary discoveries or transfers to potential users or transferees/ recipients, who will exploit the technology into new products, processes, applications, and business model" (2008).

Nevertheless, the economic theories for example the growth model (Solow, 1957) have often treated technology as given that is embodied in products or processes, where technologies that resemble blueprint, machines, or materials are easily replicated and transferred (Lin, 2003), according to (Wahab, 2012, p.62).

### **Concepts associated with Technology Transfer**

The definitions and concepts of technology transfer have been discussed in several different ways, based on research disciplines and in accordance with the aims of the research. Technology transfer is often translated into Romanian as technology transfer which is a wrong way of looking at things, because by technology transfer it can be assumed that only manufacturing technology is transferred (Bozeman, 2000; Rînea et al., 2012). Technology transfer, knowledge transfer, technology, formal technology transfer and informal technology transfer, sometimes called academic engagement (Link et al., 2007) are the concepts encountered when studying the literature.

### **The concept of formal technology transfer**

Technology transfer is the transfer process to ensure that scientific and technological developments are accessible to a wider range of users who can then further develop them. Technology transfer is seen as a movement of an innovation (idea, method or device) from a source (original context and purpose) to a destination (new context and purpose) (Bauer & Flagg, 2010). The transfer involved a number of activities that require cooperation between several stakeholder groups over a period of time. The full application of this process will advance, the technological transfer from an occasional coincidence to a structured, intermediate methodology facilitating the interaction of stakeholders where necessary (Autio et al., 2013).

University education has shifted from an elite-focused system to one that addresses the masses (Klofsten et al., 2020). In addition to conducting research and disseminating knowledge through teaching and publishing, universities are required to contribute to economic growth and entrepreneurship. Increasing the impact on society is done by universities through technology transfer processes (Baglieri 2018; Bauer & Flagg, 2010; Link et al., 2006). Formal mechanisms for university technology transfer count: Patenting - the formal method of intellectual property, Licensing agreements, Start-ups.

### **The concept of informal technology transfer**

The informal technology transfer (ITT) process is a communication mechanism that provides technical assistance, advice and research in communication. When technology transfer takes place outside formal institutional structures, when it is communicated directly and informally, it is seen as informal. The literature considers that there are 3 main forms of TTI (Link et al., 2007): Knowledge transfer, Joint publications with industry scientists, consultant. TTI activities - Informal activities are particularly common in disciplines such as the social

sciences, the creative arts, and the humanities, and are often overlooked by TTOs and academic literature. Research in the social sciences is often of interest to the public and third sectors, so that external activities mainly take the form of contract consulting and research, which are more widespread in those sectors (Abreu & Grinevich, 2013). Informal activities (contractual research, consulting) are often the basis for several formalized, contractual arrangements (Martinelli et al., 2008).

The complex nature of informal relations underlies the establishment of formalized collaborations. In addition, the partially tacit nature of knowledge and the complexity involved in pricing it makes it difficult to design a structure that includes the right incentives for academics to improve transfer. Academic entrepreneurship creates intangible value. Many forms of academic business, such as consulting or other forms of collaboration with industry, appear outside the official system (Cohen, 2004). Most often formal and informal technology transfer activities can take place as parallel or complementary processes (Gerbin & Drnovsek, 2016).

### **Academic entrepreneurship**

The commercialization of new knowledge created by universities has gained importance among scientists, university managers and decision makers in the last 30 years (Geuna et Muscio, 2008; Bozeman, 2000). The reasons for the growing interest were the adoption of the Bayh-Dole Act of 1980 and the growing number of technology-to-industry technology transfer agreements in the United States. The European Commission's Lisbon Strategy of 2000 emphasized the importance of creating and disseminating academic knowledge in order to foster regional economic development. Technology transfer may have a higher chance of success in some areas than in others. Technology transfer from universities can be expensive, constrained by environmental factors, and can be a failure more often than a success. Commercial success is a way to see the effectiveness of technology transfer.

Academic entrepreneurship can be any form of technology transfer that has a potential benefit both commercially and intellectually (Etzkowitz et al., 2000). The value of patents differs from one field to another. Currently, the practice fails to help an important part of university entrepreneurs, whose entrepreneurial activities take place outside the formal IP system in which there are technology transfer offices (Fini et al., 2010; Balconi & Laboranti, 2006). Although until now research in the field of socio-human sciences was often disseminated through public lectures and books (considered entrepreneurial activities in the field) it is observed that an increasing share of TT is transmitted to companies through consulting or informal communications, to the detriment of patents. and other formal channels.

### **Technological transfer of universities**

Academic entrepreneurship has become the main model of modern universities (Phan et al., 2009; Mosey & Wright, 2007; Shane, 2004). As universities are identified as driving forces in the technology transfer process, and academic entrepreneurship has become the dominant strategic orientation of universities, the competitive advantages in a global competition diminish. This puts pressure on university decision-makers and managers to rearrange the focus of their strategic orientations toward challenge beyond academic entrepreneurship and technology transfer (Audretsch et al., 2002). There are 8 different ways in which academics can take part in the technology transfer process: (Published articles or papers, Patents, Licenses, Attracting technology, Informal methods, Exchange of human resources, Presentation of technology at the beneficiary's place, Development of companies.

### **Criticisms of university entrepreneurship**

Entrepreneurship critics believe that publishing research and graduates are the most appropriate roles for a university institution (Brooks 1993, Pelikan 1992), because traditionally bringing research results to market is not the main role of the university. The education of a large part of the population and especially the provision of qualified personnel for industrial innovations represent the results of university teaching. There is concern that due to the increase in funding from industry, universities will focus only on research and development, neglecting their responsibilities for long-term knowledge development (Gulbrandsen & Smeby, 2005).

### **Factors limiting technology transfer / Barriers**

One classification of barriers is offered by Mazurkiewicz and Poteralska (2017), by identifying: (1) technical barriers, (2) organizational-economic barriers, and (3) system barriers to technology transfer. The authors emphasize that these types of barriers can be observed at different levels: strategic, tactical, and operational ones. “The processes of technology development and transfer conducted by R&D organizations are hampered by various barriers hindering the practical application of innovative technologies and products in the economy” (Mazurkiewicz and Poteralska, 2017, p.463). These barriers should be considered before making decisions concerning technology development, as well as during the process.

### **The main role of Technology transfer offices**

The US Bayh-Dole Act of 1980 and its European counterparts, by encouraging universities to patent inventions funded by government agencies, marked the beginning of a greater professionalization of TTOs at various universities (Rothaermel et al., 2007; OECD, 2003; Siegel et al., 2003). Meyer (2003) suggests that TTO professionalization increases the degree to which academics are involved in entrepreneurial activities. Although previous academic work has suggested a strong link between the efficiency of the TTO and the entrepreneurial activity of academics at various universities, more recent empirical work does not find a clear impact of the TTO office. For example, Stuart and Ding (2006) highlight the social structural antecedents, ie specific normative beliefs, which prevail in the department and university about entrepreneurial activity, as strong determinants of academic entrepreneurship.

### **Determinants of technology transfer**

Lately, researchers prefer to turn their attention to channels that involve direct collaboration between the university and industry, without resorting to TTOs (Wang, 2016). Instead of marketing, through academic involvement, they do not try to obtain financial resources but to have access to new fields of research, tools, unpublished data or additional funding resources (Perkmann et al., 2013). Scientists produce both publications and inventions in response to monetary and other incentives. Lach and Schankerman (2008) show that incentives for the distribution of rights for scientists strongly affect the results of innovation and licensing. Several studies have analyzed the key factors of technology transfer between the research and industrial environment (absorption capacity, human resources, trust, connection to social reality, previous experience of partnerships, international experience) and the importance of intermediary organizations. The table below (Table1) contains 20 determinants of the technology transfer process, which we found in the studied articles.

**Table 1. Factors that stimulate technology transfer**

<b>Determinants of technology transfer</b>	<b>Inhibitory factors of technology transfer</b>
Environmental changes Ability to adapt to change Scientific productivity Institutional policies Attributes Personal experience Perceived utility The institutional context Access to financial capital Local social context Organizational factors Transfer office University property Academic quality Licensing agreements Financial benefits Organizational benefits Performance payment Legislation in the field Human capital	Digression from the main objectives of the organization. Internal organization of academic institutions (Radas et Vehovec 2006) Quality issues Technology transfer offices (Weckowska, 2015) The difficulty of aligning the interests of universities and industries in long-term partnerships (Verheugen and Potocnik, 2005). Public research infrastructure - development not adjusted to the modern technology of companies (Anic, 2017) Different expectations (Wolson 2007) Administrative procedures (Borell - Damian) Property disputes (Ankrah et al 2013) The share of core funding is declining (Gulbrandsen, 2005)
<i>Source: (Aslani 2015, Aldridge 2011, Aldrich 2003)</i>	

## Methodology

In the first phase, the keywords relevant to the present research were identified. The search for the titles of academic journals that have published articles on this topic has been done in several bibliographic databases: Web of Science. Only articles published in English and Romanian were considered. A literature review was performed and over 100 papers were reviewed. The purpose of this review was to clarify some concepts and distinguish between concepts such as: technology, informal technology transfer, determinants of technology transfer. Also, another objective was to identify a gap in the literature.

## Conclusions

The articles' study shows that in many cases the technology transfer takes place outside the formal institutional structures, through a direct and informal communication between researchers and industry. Many TTI activities are not disclosed to TTOs and are often characterized by low protection of property rights, with obligations being normative and not legal. These formal and informal activities can take place as parallel or complementary processes.

Researchers tend to be more involved in activities in the first stage of the technology transfer process (contacting companies and informing them about potentially relevant research) than in activities closer or immediately related to marketing.

The knowledge and technology developed in universities, regardless of its marketing capabilities are transferred to industry and organizations in the private or public sector. In most industries, patents and licenses are not the most widely used channels for technology transfer, but the most informal ones, such as publications, conferences, informal information exchange and consulting, becoming the basis for several formalized arrangements. Formal and informal mechanisms developed by companies should be accessed to take full advantage of the universities TT potential.

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# CITY'S SOFT POWER: IDENTIFYING THE CITY'S SOFT POWER MAIN CLUSTERS

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**Abstract:** *Why do cities attract completely different types of people despite relatively similar economic development? The answer lies in the concept of city's soft power: its characteristics that attract specialists in certain fields of knowledge, personalities with a certain background and values. Nowadays, because of decentralization and deconcentration, the city becomes a significant actor at international level, possessing almost all the soft power tools, as well as the state. Soft power represents 'something special' that does not refer to economic criteria, but makes a city exceptional among others. During the research, there was created a methodology for identifying five main clusters of the city's soft power: city diplomacy, city government, cultural sector, educational sector, business and innovation sector. The methodology included comprehensive analysis of various Romanian and European cities' official statistics during 2017, 2018 and 2019, in connection with the analysis of specialized literature. The results will be used for identification of the city's soft power indicators and then creation of the practical guide or road-map with recommendations for consolidating the city's soft power. Therefore, it will make possible to qualitatively and quantitatively measure the city's soft power on the next research phase.*

**Keywords:** city's soft power, urban policy, cultural policy

## Introduction

Why do cities attract completely different types of people despite relatively similar economic development? The answer lies in the concept of city's soft power: its characteristics that attract specialists in certain fields of knowledge, personalities with a certain background and values. The concept of soft power was developed by Joseph S. Nye Jr. in the late 1980s. Nye considered soft power phenomenon as a method non-military influence between states (2011; 2004). Nowadays, because of decentralization and deconcentration, the city becomes a significant actor at international level, possessing almost all the soft power tools as well as the state.

According to the context described above, the extended abstract will be structured as follows:

- Identifying the city's soft power main clusters
  - City diplomacy;
  - City government;
  - Cultural sector;
  - Educational sector;
  - Business and innovation sector;
- Conclusions.

### Identifying the city's soft power main clusters

The city's soft power represents a certain competitive advantage, that is not related to the economic criteria only. In case of the cities, certain groups of people (youth, professionals in specific field, tourists, etc.) could be allure based on city image (Van der Borg, Russo, 2005, p. 13). Initially the concept of soft power was based on three main domains:

- Culture – places should be attractive to others;
- Political values – places' values should match individual's values;
- Foreign policies – others should consider the places' foreign policies legitimate (Joseph S. Nye Jr., 2011, p. 84).

When analysed, there appears to be a closeness of the terms 'city's soft power' and 'urban attractiveness'. Throughout the study, it became clear that these are two different phenomenon, related like meronym and holonym to areas of urban development and urban policy. According to the European Commission, urban attractiveness consists of 'transport, accessibility and mobility; access to services and amenities; the natural and physical environment; the cultural sector' (Cohesion Policy and cities: the urban contribution to growth and jobs in the regions, 2006, p. 5). There is another approach: 'business policy, basic services, pleasant environment and the housing policy, traffic, something special and economy of the city' (Neminej, 2004, p. 26). Analysing these two terms, it became quite understandable that city's soft power represents a meronym – a part of city attractiveness which represents the holonym in actual context, soft power being that 'something special' that does not refer to economic criteria. Thus, city's soft power is a particular concept applicable for special cities, while urban attractiveness is an universal concept, applicable for all cities.

After studying multiple works on the soft power concept, as well as the main domains on which it is based (Nye, 1990; Nye, 2012), it became possible to extrapolate the concept of soft power on the city level. The main domains were also detailed. As a result, five main clusters of the city's soft power were identified:

- City diplomacy;
- City government;
- Cultural sector;
- Educational sector;
- Business and innovation sector.

It is necessary to clarify what is implied by each identified cluster, what domains it includes. It will allow to present potential measurable variables of the city's soft power at the next stages of research.

*City diplomacy* refers to the possibility of establishing of cooperation with other cities or regions within country or abroad, as well as participations in international organizations (Borrás-Alomar, Christiansen, Rodríguez-Pose, 1994). The city diplomacy in case of soft power context include the promotion of cultural values and cultural diversity of the city, capitalization of city's history and cultural heritage.

*City government* refers to the improving of provided services, including development of human capital within public administration. In case of soft power context, city government should concentrate on human rights and promoting tolerance and diversity, as well as involving the civil society and citizens in the decision-making processes.

*Cultural sector* represents one of the key sectors for the city's soft power consolidation. Cultural services and market, which includes all types of public and private cultural institutions and organizations, create an image of the city, promoting its peculiarity among other cities. A small local museum could attract public or even make city visiting worthy just by using interesting exposition approach or theme, as it was done by the Museum of Freemasonry in Oradea.

*Educational sector* refers to the process of creating an infrastructure for educational services export by attracting students from other cities through educational programs that meet the needs of the labor market or offering effective programs of distance learning.

*Business and innovation sector* refer to attracting qualified professionals and investments for sustainable development. As a result of such policy there will appear new ideas, solutions and even residents, capable to develop city's soft power further.

## Conclusions

Identification of the city's soft power main clusters is an important stage for developing City's Soft Power Index (McClory, 2010; Real Instituto Elcano, 2018; USC Center on Public Diplomacy, 2019). At the current phase, it is clear that some cities have complex tools for soft power consolidations, where are presented all five clusters, but also are cities where are presented just some clusters. Such a dichotomy shows a different potential of developing according city's soft power concept (Sassen, 2005). The research results will be used for creation of the practical guide or road-map with recommendations for consolidating the city's soft power.

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# SUPPORTING COMMUNITIES DURING COVID-19: THE EMERGENCE, DEVELOPMENT AND USE OF COMMUNITY ENGAGEMENT AND SUPPORT TOOLS

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**Abstract:** *As the effects of the pandemic were visible and felt in all communities, the onset of the state of emergency as a result of the consequences of the pandemic made all communities adapt to the new conditions. Relevant models were needed to support them. This article presents the situation of community involvement networks, whether rural or urban, based on a framework that identifies several communities and support networks: on the one hand, the local representative community - administrators, councilors, mayors, teachers, etc.) and the immediate, personal community with long-term relationships (family, friends, parents, etc.). Within these communities, they can provide emotional, behavioral, cognitive or even financial support in a new setting generated by the COVID-19 pandemic. The way in which communities were formed and evolved, both theoretically and practically, demonstrates the application of the framework and for overcoming crisis situations, as was the pandemic caused by COVID-19.*

**Keywords:** community development, COVID-19, resilience, social capital.

## Introduction

Recently, the whole perception of self-help networks has marked a change in the way communities develop: from the smallest, informal ones such as family, church, group of friends, to the formal ones, known as organizations. In addition, experts in other fields, referring to the impact of the COVID-19 virus on communities, have created an active, resilient group to try to overcome this crisis using limited resources.

Although all the attention of the international community has been focused on the emergence of the COVID-19 virus and its impact on the individual, society, human and interpersonal relationships, it is worth paying attention to the involvement of local organizations in managing the COVID-19 crisis. Internationally, many institutions act on a daily basis to combat the Covid-19 pandemic and its consequences, in accordance with the specialized principle of international organizations. In addition to the World Health Organization - the highest organization that has created around it an academic and professional community involved, it has acted by identifying, for example, manufacturers of diagnostic kits, organizing research on the vaccine, fundraising, monitoring global spread of the virus etc. Other organizations such as the WTO also have a role in managing - economic and financial pandemic. However, these bodies are placed at a level far away from the most affected citizens. Precisely from this issue, this paper analyzes in a decentralized and deconcentrated way what local, public or private, central and non-governmental organizations have done to support local communities in Romania in overcoming the crisis caused by COVID-19, both in terms of human relations and the inter- and intra-group ones, considering the theoretical models used in community development.

### **Preliminary analysis of concepts**

Psychologists say that a crisis is a difficult or dangerous situation, with a pronounced degree of surprise, which requires significant attention from a person or an organization and which involves deciding in a short period of time (Voicu and Marineanu, 2006). In this regard (Balachandar *et al.*, 2020), the assistance of the communities consisted in providing pragmatic, concrete, punctual, adaptive assistance to all persons affected by the consequences of COVID-19, in order to ensure emotional stability (generally non-governmental support organizations), reduce duration and restore adaptive functionality. of public organizations.

The literature captures a multitude of definitions of the crisis, but most of them focus on the fact that they induce a state of abnormality where they occur. Thus, medicine, economic sciences, psychology, sociology, diplomacy, international relations are just as many sciences that register this phenomenon in terms of their areas of interest.

In accepting the way in which the community organizations adapted to the crisis, we will talk about the sociological side of the crisis caused by COVID-19, because it “defines the most appropriate state of the organization in such a stalemate.” (Sapriel, 2003).

Michael Regester and Jude Larkin (2003, p. 142) define the crisis as “an event that brings the company into the spotlight of potential attention, potentially unfavorable from national and international media and other groups such as customers, shareholders, employees, and their families, politicians, trade unions, and environmental lobbyists who for one reason or another have a legitimate interest in the organization's activities.”

The definition given by John Burnett is much broader than those already mentioned and perhaps even more practical for what this paper wants to correlate the ability of some organizations to adapt to the crisis caused by the pandemic. He points out that events must be seen through the prism of the communities that pass through them. Therefore, he rejects the view that the only crises to be fought are disasters, instead suggesting that crisis management should become a naturally integrated part of the culture of organizations and that it should be seen as a continuum.

The problem of development has been a serious concern lately, because economic growth, human well-being and social progress are more difficult to achieve today, in the context of the global economy, than in the past. Moreover, involving crises or pandemics further amplifies the context already presented. It can be seen that we can have economic growth at national or regional level and at the same time important imbalances between the component units. On the one hand, since the outbreak of the pandemic, we have seen economic decline through us limiting industrial activity, declining jobs due to technical unemployment, etc., and on the other hand increasing poverty, declining community resilience and the list of consequences can continue. The ideal of development, as described by theorists, would be for it to generate well-being for all people.

In all the concern to analyze the impact of the development of different communities during the crises, it is important to remember that a community has certain particularities, especially in direct connection of interdependence with resilience or vulnerability. Recent developments (improved living conditions) have led to the evolution of the community towards what Tönnies called society, where the individual lives for himself and social and economic relations with others are competitive. In other words, “the repository of the community spirit could only be the community, a social reality considered the exclusive prerogative of the spaces characterized by phenomena and practices specific to the traditional environment. The society - creation of the urban environment of modern type and more and more tried by crises - would have been a construct with a strictly instrumental purpose, lacking the consistency of community type relations” (Zamfir, *et al.*, 2007, p. 117).

### **A retrospective of how the Covid-19 pandemic evolved**

According to the European Council (2021), the COVID-19 pandemic affected all Member States across Europe and beyond. COVID-19 is an extremely infectious disease that has tested the protection of public health as well as the health and well-being of communities.

For example, the European Union and its Member States have developed a common approach to ensuring safe vaccines against COVID-19, coordinating testing strategies and facilitating the provision of medical and protective equipment throughout Europe. Even though vaccination started in the EU in December 2020, the pandemic continues to affect EU countries. European leaders meet regularly to exchange strategies, as well as to coordinate the EU's collective efforts to limit the spread of the virus and support our health systems. As the epidemiological situation in Europe remains worrying, despite all efforts, EU leaders continue to regularly address the issue of coordination in the EU response to the COVID-19 pandemic in their video conferences and at the European Council (2021).

Improving the level of preparedness and cooperation between EU countries, as well as accelerating vaccination efforts and promoting European solidarity, remain essential to combat COVID-19. The most powerful pandemic monitoring tool (at least numerical = number of cases and evolution over time from time T0) was the one provided by the Center for Systems Science and Engineering (CSSE) in the Department of Civil and Systems Engineering at Johns Hopkins University (JHU). The interactive tool is the policy and the continuous result in the development of this science of interconnection. Hosted in the Johns Hopkins Department of Civil and Systems Engineering, CSSE takes a multidisciplinary approach to modeling, understanding and optimizing systems of local, national and global importance. Considering this tool, we can see the severity of the COVID-19 pandemic in Romania: from the time of the first infection (February 26, 2020) until now, approx. 5.92% of the total population of Romania became infected. Most cases, according to the report, were registered in November 2020.

In another approach (COVID-19 – Romanian Economic Impact Monitor), the development and economic impact brought by the pandemic caused by COVID-19 stimulated a group of local researchers (from Cluj-Napoca) to carry out a research project that includes a specialized online platform, through which university researchers involved in this approach. scientifically publishes a series of relevant data on the economic impact of the COVID-19 pandemic in the form of interactive infographics, meant to show a comprehensive, real-time updated image of the situation of the Romanian economy. The main objective of the project is to provide real support to decision makers in Romanian politics and economy by conducting and frequently updating the analysis of the situation generated by the COVID-19 epidemic, respectively by providing a starting point for achieving better forecasting scenarios. protection of the company, of the companies, of their employees, respectively of the supply chains from the real economy. It is a case of collaboration within a small group of researchers from an academic community, but which can be an administrative-functional example of collaboration and support for overcoming the crisis.

Throughout this pandemic context, a number of measures have been taken that have challenged communities to adapt to the new context and to develop self-help networks:

- Decree no. 195 of March 16, 2020 on establishing the state of emergency on the territory of Romania. Issuer: President of Romania

- The 13 Military Ordinances issued in 2020 by the Ministry of Internal Affairs

First, the measures carried a strong psychological message, which is the fear of others, along with the idea that others are potential carriers of deadly germs and life-threatening diseases. This is exactly what this paper try to analyze: how were the mobilized organizations / groups / communities in supporting and endogenous development of communities.

## The communities of engagement framework

We need to know from the beginning that while diseases like COVID-19 spread easily through human contact, it is important to be aware that the enemy remains the virus and not our peers. Sikali (2020). The same author said that while hygiene measures have remained the same as in previous pandemics, the rules of social distancing have been particularly disruptive for communities.

Researchers and practitioners in sociology, but also in the field of administrative sciences have set themselves the goal of identifying processes and structures that can boost the ability of groups, local actors, states, companies and even communities represented by people to withstand such crises (Boin & van Eeten, 2013, pp. 430).

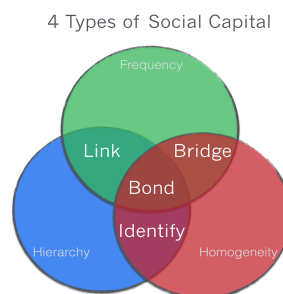
Any adaptation process also involves a change, therefore human cognitive and adaptive capacity are affected. A recent study (Hîntea, Stanică, 2018) explored the quality of life of citizens in rural and urban areas of the Cluj-Napoca Metropolitan Area. The results in terms of citizen engagement and trust in different organizations were surprising: most people rely on self-help relationships between family members (relatives) or friends, less so than in formal structures.

Descriptive Statistics				Descriptive Statistics			
	N	Mean	Std. Deviation		N	Mean	Std. Deviation
viata de familie	513	8.7778	4.35546	viata de familie	203	8.7094	1.80737
conditii de locuit	523	8.0554	1.61494	conditii de locuit	203	8.2020	1.84380
sanatatea personala	518	8.0444	1.91400	sanatatea personala	201	8.1990	1.80006
viata sociala	519	7.9730	1.83679	viata sociala	201	7.8209	1.85142
situatia economica personala	518	7.3996	1.84416	nivelul de trai	203	7.2315	2.06829
nivelul de trai	521	7.2764	1.79861	situatia economica personala	200	7.2100	2.15619
Valid N (listwise)	500			Valid N (listwise)	184		

**Figure 1. The average degree of personal satisfaction with certain factors. Left (urban - Cluj-Napoca), right (rural Cluj).**

Source: Hîntea, Stanică, 2018.

Based on this premise, the existence of forms of cooperation at the level of immediate communities and to illustrate the potentially important support of communities, we describe the types of social capital that have been affected by COVID-19, together with the ways in which governance has supported community members.



**Figure 2. Types of Social Capital.**

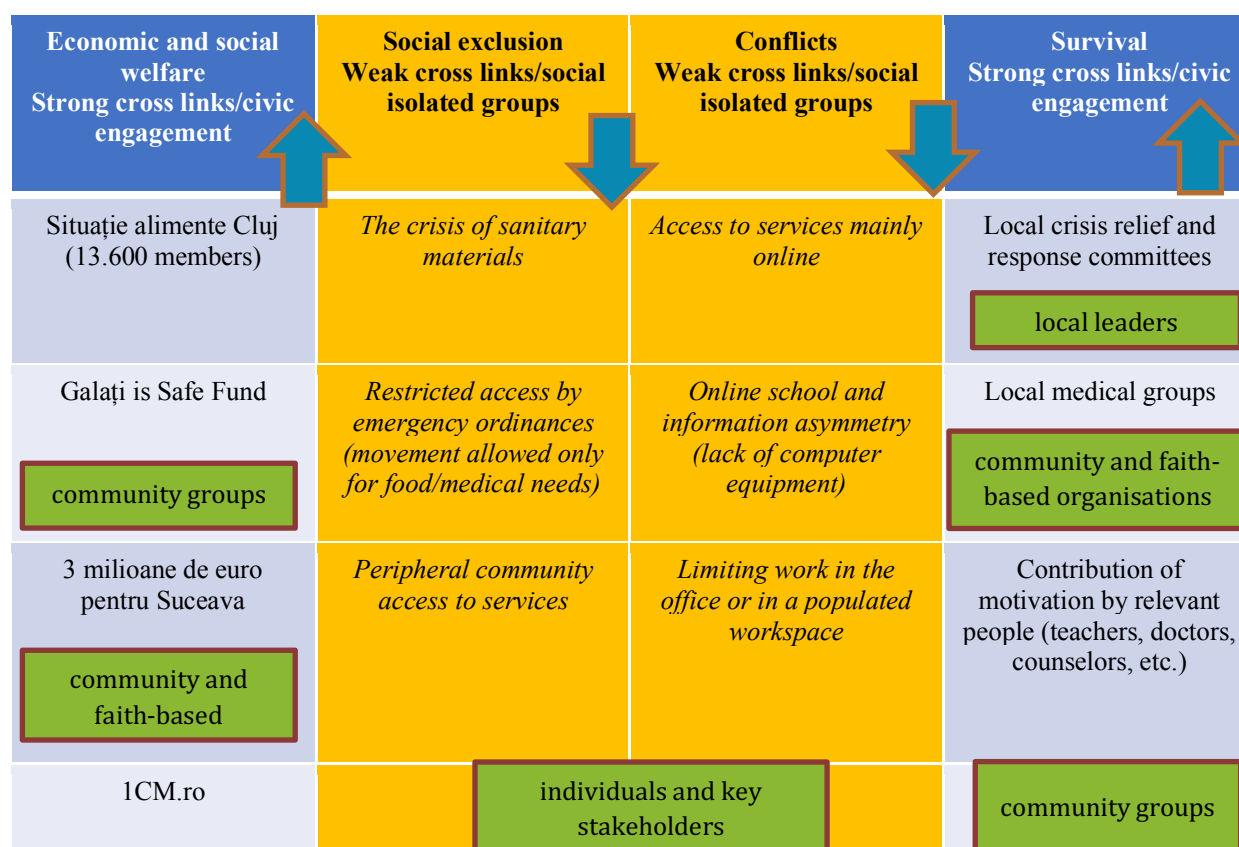
Source: Narayan, 1999, p. 13.

The social capital represents the totality of the connections that are establish at the community level between individuals or between individuals and organizations, trust, assumed rules and help reciprocal. Based on these relationships, various associations, institutions and groups from



the community can provide an informal framework which facilitates the coordination of activities, transmission information and facilitates the collective adoption of the decision.

Given that resources have been unevenly distributed asymmetrically between different groups, cross-cutting links between social groups become important, both in terms of social cohesion (reducing social disparities and therefore the likelihood of cleavage, division) and economic opportunities (connecting to different resources based on information). Therefore, the model proposed by Narayan (1999) was the methodological basis used to highlight various communities that faced limited governance.



**Figure 3. Types of communities that emerged as a result of the response to the COVID-19 crisis in Romania.**

*Source: the author*

Cross-cutting links (Narayan, 1999, pp. 16-17) complement the proper functioning of state institutions (complementarity) resulting in economic and social well-being in the case of a high level of relationship between groups (which was not very well customized in our analysis). A low level of cross-cutting links (the most used and present in the middle of the picture) leads to social exclusion (as was the poor situation of online education, where only certain groups had access to online education).

In the case of dysfunctional states, the substitution of the poor functioning of institutions by the high level of bridging social capital can be the basis of survival strategies (such as local emergency committees, groups of doctors or local leaders who have aligned in supporting communities); therefor informal systems replace the formal system.

An increased level of bridging social capital, doubled of strong intragroup relations, determined the emergence of the most active self-help communities known: food situation Cluj-Napoca (in response to the food crisis during the state of emergency in Romania), or fundraising

to overcome the crisis in Suceava Emergency Hospital ("3 million euros for Suceava). The lesson of such an instrument would be that the institutions should act in the following directions:

1. the development of mechanisms for the inclusion of persons or groups excluded from official financial, education or governmental systems in such pandemics / crises;
2. promoting change in the system of values and norms, in order to support social inclusion;
3. creating economic opportunities and
4. encouraging social connectivity between excluded and strong groups in different spheres of activity. "

Small or weak communities need additional leadership effort and temporary support until they are able to interact with government, education or financial systems, and thus overcome such a crisis. The role of civil society in supporting them is also important and has been very well highlighted by these examples.

## **Conclusions**

The importance of these forms of social capital in overcoming the crisis caused by COVID-19 is certain. But social capital brings benefits that go far beyond the realm of endogenous community development. It is essential for the creation of a healthy civil society, with civil society being the domain of groups and associations between the family and the state. Also, under certain conditions, social capital could encourage a greater degree of innovation and adaptation to group life.

Our analysis revealed six main actors involved in the community: local leaders, community-based and faith-based organizations, community groups, health institution committees, individuals and key local stakeholders. They functioned in various functions: design and planning, community entry and trust building, social and behavior change communication, risk communication, supervision and tracking, and logistics and administration. All functions are interdependent: communities and organizations are open systems with crisis adaptation capabilities.

At the same time, the paper outlined the importance of reaching marginalized populations and supporting equity-based responses (especially as evidenced by the help provided by various non-governmental organizations in remote communities without access to online education infrastructure).

Aligning previous experience of community involvement with the current recommendations of the COVID-19 Community Strategy highlights how communities can play important and active roles in prevention and control. The need to assess existing community involvement structures and to use community involvement approaches to support context-specific, acceptable and appropriate COVID-19 prevention and control measures remains an increasingly common concern in Romanian public policy practice.

The present research, although descriptive, also has some limitations: the associative environment has often shown creativity, offering excellent practical and behavioral models, but the development and overcoming of crises at the local level cannot be based only on social capital. In the absence of economic resources or other forms of capital, it has limited value. Romanian experience shows that in communities with a high level of bonding social capital (traditional, small, isolated villages), participatory community development policies face problems due to resistance to change and external stimuli (as the vaccination campaign proved to be in these areas).

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# ARGUMENTS FOR AN EFFICIENT AND ARTICULATED INSTITUTIONAL PUBLIC COMMUNICATION

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**Abstract:** *Starting from the premise that in a democratic society, public institutions are not external forms, foreign and opposable to society, but are emanated by it to serve its development, it is natural the need for transparency and development of effective communication models by those institutions. In this contemporary agora, public institutions are, of course, important components of the democratic exercise. Their operation according to the principles of open communication and transparency for the population are vital conditions for the democratic development of society. The paper will address the following four key issues regarding the importance of effective and articulated transparent public communication. The first argument is that access to information on the activity of public institutions is a citizen's right and falls within the scope of legal regulations. Of course, the arguments regarding the transparency of the activity of public institutions are numerous and generally consensually accepted in society. Information and its free movement is precisely the basis of the functionality of democracy, it is vital and indispensable. But for these arguments and principles to become effective and socially functional, they must be regulated by law, transposed into the letter of the law. The paper will identify some significant benefits of regulation by law in this area of transparency in the field of information of public interest and the laws governing this area. The second issue affirms that institutions in the same field should have uniform, harmonized communication strategies. It is about designing a vision of articulated, coherent communication. The paper will identify the arguments for this desideratum, as well as models of good practice from the private environment that can be adopted. The third issue relates to public communication of private companies and whether it is a model to follow. We believe that it can be said that in recent decades the standards of communication with the target audience have been permanently raised by actors from the commercial sphere, namely private companies. Can institutional public communication keep up? Lastly, the fourth issue relates to the permeance of communication and the necessity of permanent evaluation. In order to be efficient, corrected and improved, public communication needs evaluation. Just as in order to be sustainable, communication must be permanent, and its evaluation must be permanent. In order to be efficient, corrected and improved, public communication needs evaluation. Just as in order to be sustainable, communication must be permanent, and its evaluation must be permanent. Who and how does that?*

**Keywords:** public communication, public institutions

## Introducere

Plecând de la premisa că într-o societate democratică instituțiile publice nu sunt niște forme exterioare, străine și opozabile societății, ci sunt emanate chiar de aceasta pentru a servi dezvoltării sale, apare firească necesitatea transparentizării și dezvoltării unor modele de comunicare eficientă din partea respectivelor instituții. Pentru că pentru a putea fi de folos și a ajuta sau servi pe cineva sau ceva, în speță societatea, trebuie să știi și să poți să te faci auzit și înțeles, dar în egală măsură să asculți și să înțelegi, altfel spus, să comunici. Ajungem astfel în sfera publică și aici regăsim un sub-tip al comunicării și anume comunicarea publică, instituțională. „Comunicarea în general lat. *communicare* = *punerea în comun a unor lucruri de indiferent ce natură*) și cea publică în particular (se definește prin legitimitate,

responsabilitate) presupune mai mult decât a informa sau a se informa, înseamnă, a acționa asupra cetățeanului, scopul ei fiind cel de a convinge și de a obține adeziunea conștientă a cetățeanului, cu privire la deciziile publice adoptate, la politicile instituționale. Specificul comunicării publice constă în caracterul dialogal al ei, cetățeanul nu trebuie să fie un *receptacol*, ci dimpotrivă trebuie să acționeze în calitate de partener al mesajului, apoi al deciziilor, programelor instituționale” (Rădulescu, 2015, p.100).

### **Cadru teoretic**

Pentru că tot ne-am referit mai sus la sfera publică, trebuie spus aici că cel care a introdus acest concept în limbajul de specialitate a fost sociologul și filosoful german Jürgen Habermas, reprezentant al școlii de la Frankfurt. Pentru Habermas sfera publică este un spațiu public al dialogului unde are loc interacțiunea dintre cetățeni cu rădăcini întinse departe în trecut și în zorii societăților democratice din antichitate. „*Sfera publică* este un spațiu aflat în opoziție cu spațiul privat, este o arenă publică la care au acces toți cei care doresc să participe și în care are loc un permanent schimb de informații, de argumente, de opinii etc., cu finalitatea clară de a permite decantarea acelor informații, argumente, opinii etc., dominante. Explozia mijloacelor de comunicare în masă, de la dezvoltarea ziarelor, începând cu jumătatea secolului al XIX-lea, și până la noile media de astăzi, nu a făcut altceva decât să adauge noi dimensiuni acestei *agora*” (Pricopie, 2010, p.77). În această *agora* contemporană, componente de primă importanță ale exercițiului democratic sunt și instituțiile publice. Funcționarea lor după principii de comunicare deschisă și transparență pentru populație sunt condiții vitale pentru dezvoltarea democratică a societății. Instituțiile publice trebuie să fie deschise tuturor, iar ele trebuie să fie un simbol al autorității statului, dar al unui stat care promovează binele și interesul legitim al cetățenilor săi. „Denumim evenimentele și ocaziile *publice* atunci când sunt deschise tuturor, în contrast cu activitățile închise sau exclusive – atunci când vorbim de locuri publice sau construcții publice. Dar la fel ca în expresia *clădire publică* termenul nu trebuie să se refere la accesul general; clădirea nici măcar nu trebuie să fie deschisă traficului public. *Clădirile publice* pur și simplu găzduiesc instituțiile statului, și ca atare sunt *publice*. Statul este *autoritatea publică*. El datorează acest atribut sarcinii sale de a promova binele public sau comun al membrilor săi îndreptățiți” (Habermas, 1989, p.2). În privința instituțiilor publice difuzarea și transparentizarea informației despre activitatea acestora contribuie la creșterea raționalității deciziilor luate, iar dezbaterea publică aduce feed-back constructiv. Nu este o altă cale pentru a maximiza folosul societății care le finanțează și le susține decât aceasta. Pentru a-și dobândi legitimitatea publică, instituțiile pur și simplu trebuie să fie transparente și să comunice eficient și deschis. Accesul la informație privind activitatea instituțiilor publice este un drept cetățenesc și intră în sfera reglementărilor legale.

Desigur că argumentele privind transparența activității instituțiilor publice sunt numeroase și în general consensual acceptate în societate. Informația și libera ei circulație stă tocmai la baza funcționalității democrației, este vitală și indispensabilă: "Informația este oxigenul unei societăți democratice. Dacă cetățenii nu sunt la curent cu ce se întâmplă în societatea în care trăiesc, dacă activitățile guvernanților nu sunt publice, atunci cetățenii nu pot să se implice în mod activ în viața acelei comunități” (The Public’s Right to Know in Mogoș, 2003). Dar pentru ca aceste argumente și principii să devină efective și funcționale în plan social, ele trebuiesc reglementate normativ, transpuse în litera legii. Putem enumera aici câteva beneficii semnificative ale reglementării prin lege în acest domeniu al transparenței în sfera informațiilor de interes public:

- Gradul de transparență al instituțiilor publice și reglementările legale în această privință duc la o mai mare încredere în rândul cetățenilor că respectivele instituții le servesc interesele. În societatea românească reglementările legale în acest sector sunt cu atât mai importante cu cât amintirea tristă a unui regim totalitarist și iubitor

de cenzură este încă proaspătă. Instituțiile publice au ieșit din acea perioadă istorică întunecată de dictatură comunistă cu imaginea pătată, fiind considerate aservite regimului comunist și nu activând în folosul societății.

- Atunci când transparența instituțiilor publice este reglementată legal crește și legitimitatea lor proporțional, iar acest aspect este important, căci fără legitimitate ar activa doar ca niște entități străine societății.
- Ca principiu, instituțiile statului trebuie să se afle într-un permanent dialog cu cetățenii, iar acest dialog nu se poate face oricum ci trebuie reglementat prin lege pentru a se preveni situații de blocaje sau abuzuri. Trebuie reglementat când se comunică, ce se comunică și cum se comunică din partea instituțiilor, iar cetățenii trebuie să știe clar cum pot solicita informații în mod legal.
- Datorită reglementărilor legale, membrii societății ajung să conștientizeze că instituțiile statului sunt acolo pentru a-i servi, iar dacă își cunosc bine drepturile și obligațiile vor considera că opinia lor contează.

Care sunt însă normele legale care reglementează acest domeniu al transparenței informațiilor de interes public și ce prevăd ele, în esență? Dacă este să analizăm de la general înspre particular, atunci prima referire trebuie să o facem la *Declarația universală a drepturilor omului*, care prevede la articolul 19 că „Orice om are dreptul la libertatea opiniilor și exprimării; acest drept include libertatea de a avea opinii fără imixtiune din afară, precum și libertatea de a căuta, de a primi și de a răspândi informații și idei prin orice mijloace și independent de frontierele de stat”.

Glisând acum reperele în plan european, (căci România face parte din Uniunea Europeană), avem prevederi și în *Carta drepturilor fundamentale a Uniunii Europene*, unde la articolul 11 care tratează libertatea de exprimare și de informare se prevede că: „(1) Orice persoană are dreptul la libertatea de exprimare. Acest drept cuprinde libertatea de opinie și libertatea de a primi sau de a transmite informații sau idei fără amestecul autorităților publice și fără a ține seama de frontiere, și (2) Libertatea și pluralismul mijloacelor de informare în masă sunt respectate”, iar la articolul 42: „Dreptul de acces la documente - orice cetățean al Uniunii și orice persoană fizică sau juridică care are reședința sau sediul social într-un stat membru are dreptul de acces la documentele instituțiilor, organelor, oficiilor și agențiilor Uniunii, indiferent de suportul pe care se află aceste documente.”

În plan național de data aceasta, *Constituția României*, legea fundamentală a țării, prevede la articolul 31 următoarele: „(1) Dreptul persoanei de a avea acces la orice informație de interes public nu poate fi îngrădit. (2) Autoritățile publice, potrivit competențelor ce le revin, sunt obligate să asigure informarea corectă a cetățenilor asupra treburilor publice și asupra problemelor de interes personal. (3) Dreptul la informație nu trebuie să prejudicieze măsurile de protecție a tinerilor sau securitatea națională. (4) Mijloacele de informare în masă, publice și private, sunt obligate să asigure informarea corectă a opiniei publice.”

În spiritul prevederilor Constituției României, legile specifice care reglementează accesul liber la informații publice și transparența decizională administrativă sunt *Legea nr. 544 din 12 octombrie 2001 privind liberul acces la informațiile de interes public, publicată în MONITORUL OFICIAL nr. 663 din 23 octombrie 2001* și *Legea nr. 52/2003 privind transparența decizională în administrația publică, publicată în Monitorul Oficial, Partea I nr. 70 din 03 februarie 2003*. Punctăm aici câte articole esențiale din *Legea nr. 544*: Articolul 3 – „Asigurarea de către autoritățile și instituțiile publice a accesului la informațiile de interes public se face din oficiu sau la cerere, prin intermediul compartimentului pentru relații publice sau al persoanei desemnate în acest scop”. Articolul 4(1) „Pentru asigurarea accesului oricărei persoane la informațiile de interes public autoritățile și instituțiile publice au obligația de a organiza compartimente specializate de informare și relații publice sau de a desemna persoane cu atribuții în acest domeniu.” Articolul 6(1) „Orice persoană are dreptul să solicite și să obțină

de la autoritățile și instituțiile publice, în condițiile prezentei legi, informațiile de interes public.(2) Autoritățile și instituțiile publice sunt obligate să asigure persoanelor, la cererea acestora, informațiile de interes public solicitate în scris sau verbal.” Articolul 11(1) „Persoanele care efectuează studii și cercetări în folos propriu sau în interes de serviciu au acces la fondul documentaristic al autorității sau al instituției publice pe baza solicitării personale, în condițiile legii.” Articolul 15(1) „Accesul mijloacelor de informare în masa la informațiile de interes public este garantat.(2) Activitatea de culegere și de difuzare a informațiilor de interes public, desfășurată de mijloacele de informare în masa, constituie o concretizare a dreptului cetățenilor de a avea acces la orice informație de interes public.” Ne mai putem referi apoi și la Codul administrativ, care la articolul 8 prevede: „Principiul transparenței - (1) În procesul de elaborare a actelor normative, autoritățile și instituțiile publice au obligația de a informa și de a supune consultării și dezbaterii publice proiectele de acte normative și de a permite accesul cetățenilor la procesul de luare a deciziilor administrative, precum și la datele și informațiile de interes public, în limitele legii. și (2) Beneficiarii activităților administrației publice au dreptul de a obține informații de la autoritățile și instituțiile administrației publice, iar acestea au obligația corelativă a acestora de a pune la dispoziția beneficiarilor informații din oficiu sau la cerere, în limitele legii.” După cum se poate observa, legislația este cuprinzătoare, bine structurată, cu prevederi clare. Este însă foarte importantă și respectarea și aplicarea normelor așa cum sunt ele prevăzute.

*Instituțiile din același sector de activitate sau domeniu ar trebui să aibă strategii de comunicare unitare, armonizate.*

Este vorba despre a proiecta o viziune de comunicare articulată, coerentă. Sunt ușor de găsit argumente pentru acest deziderat.

Astfel, dacă este să privim lucrurile din perspectiva cetățeanului, adică principalul beneficiar al serviciilor instituționale, pentru acesta ar fi mult mai simplu și avantajos dacă ar putea să se familiarizeze cu un pattern stabil de comunicare al unor instituții asemănătoare sau complementare la care el apelează frecvent. Ar crește eficiența informării, s-ar scurta timpii petrecuți cu căutarea de informații, pentru că ar fi mult mai confortabil pentru cetățean dacă știe că anumite informații pe care le caută pot fi găsite într-o anumită locație și într-un anumit format, de preferință standardizat. S-ar forma o deprindere, o manieră de informare standardizată, o schimbare la nivelul mentalului colectiv care ar aduce confort, satisfacție, eficiență crescută, sentimentul că *managementului public îi pasă*. Această standardizare și prezentare unitară a informațiilor, a comunicării instituțiilor din același domeniu, branșă sau sector de activitate poate lua diverse forme, cum ar fi birouri de informații organizate după un principiu unitar, elemente de identitate vizuală standardizate, logo-uri, culori, fonturi, un anumit format al panourilor informative, pliante, un *template* comun pentru paginile web. Pentru managementul public al acestor instituții, ar aduce de asemenea doar avantaje abordarea unitară a comunicării publice. Astfel, dacă este să ne gândim doar la eficiență, aceasta poate fi mult crescută. Este considerabil mai ușor de administrat un birou de informații organizat după un tipar standard, cu reguli stabilite în mod generalizat, apoi materialele informative, pliante, panouri, etc. pot fi comandate la un singur furnizor, la fel paginile web, pot fi administrate de un singur serviciu (sau firmă dacă se optează pentru externalizare), care poate folosi o viziune unitară astfel încât utilizatorul să poată găsi în aceeași zonă ușor și intuitiv informația de care este interesat. Toate acestea vor atrage automat și o reducere de costuri, deci o mai bună administrare a banului public.

Modele de bună practică pot fi găsite din nou în sectorul privat. Orientându-se după principiile concurențiale ale economiei de piață, ale eficienței și optimizării costurilor, actorii din sectorul privat au înțeles de mult importanța unor strategii unitare și coerente de comunicare publică și construcție de imagine. Astfel, este suficient să aruncăm o privire la rețelele de magazine care au unități răspândite în teritoriu. În cazul lor, este extrem de ușor să te orientezi,

să te informezi. Aceleași model de panouri cu informații, plasate cam în aceleași locuri în toate unitățile, ambient cu design unitar, caracteristic, logo-uri, fonturi uniforme, ghișeele de informații funcționând după aceleași reguli clare, paginile web cu design unitar, funcțional. Și exemple de genul acesta mai pot fi găsite multe, cum ar fi rețelele băncilor, ale dealerilor auto, rețele de restaurante, benzinării etc.

Sectorul public are de unde prelua modele și chiar rețete dovedite ca funcționale, fiind suficient să le adapteze. Din păcate, sunt mult mai greu de găsit cazuri de viziune unitară a comunicării pentru instituțiile statului. Și loc de aplicare și eficientizare ar fi! Este suficient să ne gândim la instituții care fac parte din aceleași structuri, cum ar fi spitale, școli, prefecturi, administrații financiare, agenții guvernamentale, primării, etc. La o analiză atentă, e dificil de identificat o strategie comunicațională unitară și eficientă. Probabil în majoritatea cazurilor nici nu s-a pus problema!

Cu toate că în sectorul public lucrurile sunt așadar rămase în urmă în privința strategiilor unitare, coerente și articulate de comunicare publică, totuși se pare că deficiențele au fost conștientizate și au apărut inițiative în acest sens. Astfel, la momentul redactării acestui material, se discută intens la nivel politic despre adoptarea unei tehnologii care vizează așa-numitul *cloud guvernamental*. De pe pagina de web a *Autorității pentru Digitalizarea României*, aflăm că: „Tehnologia cloud computing va genera numeroase beneficii pentru instituțiile publice: scalabilitate, elasticitate, performanță ridicată, rezistență și siguranță, eficientizare a costurilor, dar și rentabilitate. Cloud-ul guvernamental va oferi infrastructura necesară pentru toate instituțiile care au obligația să preia și să stocheze informațiile beneficiarilor de servicii publice, precum și să le protejeze datele. De asemenea, cloud-ul guvernamental are capacitatea de a optimiza funcționarea tuturor serviciilor publice electronice din România” (ADR, 2021). Putem intui așadar că este o tehnologie care va aduce beneficii pentru instituțiile publice și probabil va ajuta la soluționarea unora dintre carențele semnalate mai sus.

### **Comunicarea publică a companiilor private, un model de urmat?**

Credem că se poate afirma fără riscul de a greși prea mult că în ultimele decenii standardele comunicării cu publicul țintă au fost permanent ridicate de către actori proveniți din sfera comercială, anume companiile private, aceasta desigur în principal din rațiunea interesului comercial și al maximizării profitului care stă la baza existenței și funcționării acestor companii supuse permanent competiției generată de regulile economiei de piață. În lupta continuă pentru clienți, acestea au dat tot mai mare importanță analizei felului în care sunt percepute în piață astfel încât măsurarea a ceea ce se numește *customer satisfaction* a devenit aproape o religie în mediul acesta competitiv. Aceasta a rezultat într-o rafinare a modelelor de comunicare cu clienții, au fost alocate resurse importante în acest scop, sunt finanțate consistent departamente de relații cu publicul, zeci și sute de operatori sunt pregătiți să răspundă oricând la telefon, emailuri, mesaje, cu o solitudine și o amabilitate de-a dreptul fantastică. Competiția din piața liberă are un astfel de efect, și a arătat că aceasta este direcția de urmat, o abordare care pune clientul și comunicarea cu acesta în prim plan al reușitei afacerii. Operatorii au parte de traininguri pentru a putea răspunde la orice întrebări despre produsele și serviciile oferite de respectivele companii, dar sunt bine pregătiți și în ceea ce privește abilitățile de comunicare, exprimare logică, dicție, empatie, răbdare, disponibilitatea de a asculta problema clientului. De multe ori după un apel al clientului compania revine la acesta cu un chestionar de evaluare, în care este rugat să aprecieze dacă acel consultant/operator cu care a luat legătura i-a rezolvat problema, a comunicat bine, s-a comportat într-o manieră profesionistă. Este ceva mai rar întâlnit în cazul contactului cu o instituție publică de stat! Se poate spune că au lansat de-a dreptul o provocare în ceea ce privește comunicarea publică instituțiilor guvernamentale și au



ridicat mult stacheta. Instituțiile publice pot așadar găsi modele de bună practică în ceea ce privește comunicare cu publicul și pot prelua multe dintre aceste modele din mediul privat.

### **Resorturile care stau la baza inițierii comunicării publice.**

Acestea pot fi cu siguranță diferite la companiile private față de instituțiile publice. Dacă la cele dintâi primează interesele comerciale, lupta pentru clienți, imagine comercială și necesități provenite din competiția în piața liberă, în cazul instituțiilor publice acestea pot fi diferite, în sensul că acestea din urmă au (sau trebuie să aibă) perspective mai largi, legate de binele comun și progresul societății. „În timp ce publicitatea comercială laudă atuurile produselor pentru a-i face pe oameni să le cumpere, comunicarea publică, ale cărei tehnici și mijloace sunt asemănătoare datorită utilizării generalizate a posibilităților mediatice (campanii de afișare, mesaje televizate), încearcă să-l facă pe fiecare cetățean responsabil de alegerile sale în materie de sănătate și securitate și să asigure participarea sa la viața publică” (Stănciugelu, 2014, p.335). Vorbim aici despre rol în apărarea valorilor democratice, acțiuni care duc la buna funcționare a societății, apărarea drepturilor omului, protejarea libertății, a egalității de șanse și tratament, etc. Unele instituții au rol în promovarea educației, a culturii, artei, iar comunicarea în aceste cazuri trebuie preponderent orientată în aceste scopuri. Sunt așadar sectoare ale vieții publice care nu pot intra (sau nu în totalitate cel puțin), în sfera serviciilor private. Complexitatea comunicării publice este iarăși un aspect de luat în considerare. Dacă în cazul companiilor comerciale se merge spre reducerea pe cât de mult posibil a complexității mesajelor în scopul de a ajunge la cât mai mulți potențiali clienți, în cazul instituțiilor publice nu se poate proceda întotdeauna la fel, căci în funcție de situație pot exista mesaje pe înțelesul tuturor, destinate unui public larg, general, sau în alte situații este necesară o comunicare pe teme specifice cu grad înalt de specializare, cu caracter uneori abstract și poate pentru mulți greu de priceput. Așadar, este uneori nevoie de argumentare pe mai multe niveluri de înțelegere.

Desigur că în lupta aceasta pentru atenția publică au o importanță semnificativă și bugetele alocate departamentelor de relații publice. Instituțiile de stat nu vor putea niciodată concura cu marile companii comerciale din această perspectivă, cele din urmă având alocate resurse pentru departamentele de comunicare mult mai generoase. Dar atitudinea față de cetățeanul care are nevoie de un serviciu din partea instituției guvernamentale poate și trebuie să se schimbe, în sensul atenției la nevoile sale și îmbunătățirii comunicării cu el, iar asta nu necesită mereu investiții financiare mari, ci doar o schimbare de optică, așa cum mediul privat concurențial a făcut-o în ceea ce privește comunicarea cu clientul. Oricum, provocarea a fost lansată, mănua a fost aruncată, instituțiile publice vor trebui să urmeze trendul pentru că cetățenii au deja create așteptări mari în privința ridicării calității dialogului social, iar tendința aceasta nu pare a fi reversibilă, cel puțin în cazul regimurilor democratice.

### **Comunicare permanentă, evaluare permanentă.**

Pentru a genera un climat de încredere și predictibilitate, comunicarea publică nu trebuie să fie o activitate sporadică, determinată doar de anumite evenimente din viața instituției publice, ci trebuie să devină un exercițiu permanent, articulat, bazat pe o viziune și o strategie unitară. Lucrurile în procesul comunicării nu trebuie lăsate la voia întâmplării, trebuie stabilit clar cine comunică în numele instituției, ce comunică și cum o face. Suprapunerea emisiei de mesaje de către emițători din cadrul aceleiași instituții care nu comunică înainte între ei și nu sunt coordonați, poate produce confuzie. Este nevoie de o viziune unitară și deci de o strategie unitară: „Elaborarea unei strategii de comunicare publică ține cont de principii tehnice riguroase. Un singur subiect trebuie să fie abordat în timpul campaniei (*unitatea temei*); informația trebuie să se desfășoare pe o perioadă de timp definită științific, fără întrerupere (*unitate de timp*). Impactul comunicării este cu atât mai puternic, cu cât cel mai mare număr de mijloace este reunit în profitul său (*unitate a întregului*). Strategia ia în calcul următoarele

puncte: alegerea temei campaniei, definirea țintei urmărite, a concepției, a tonului, conținutului, atracția și semnătura mesajului. Este ales în funcție de împrejurări subiectul pentru care comunicarea are cele mai multe șanse de a modifica starea existentă. Concepția mesajului, element fundamental al comunicării, se supune unor principii ce au în vedere eficiența” (Stănciugelu, 2014, p.341). Pentru a fi eficientă, strategia de comunicare trebuie să fie adaptabilă în funcție de mediul pentru care este proiectată. Dacă acest mediu este în schimbare rapidă, acest lucru poate pune dificultăți în implementarea oricărei strategii. „Strategia nu este întotdeauna posibilă sau relevantă. Este mai ușor atunci când mediul este stabil sau predictibil în mod rezonabil.” (Mulgan, 2009, p.19).

Pentru a putea fi eficientizată, corectată și îmbunătățită, comunicarea publică are nevoie de evaluare. Așa cum pentru a putea fi sustenabilă, comunicarea trebuie să fie permanentă, și evaluarea ei trebuie să fie permanentă. Tendința pentru acordarea de importanță sporită evaluării comunicării publice provine tot din mediul privat, așa cum arătam mai sus. Marile companii au fost primele care au realizat importanța evaluării felului în care comunică și în care sunt percepute. Raționalitatea mecanismelor economiei de piață le-a orientat în această direcție. Au început să aloce resurse importante pentru asta, și în multe cazuri se apelează la așa-numitul „audit al comunicării organizaționale”. Instituțiile publice probabil vor trebui să le urmeze, având desigur ca dificultate suplimentară resursele limitate ce pot fi alocate în acest scop.

Apare firesc acum întrebarea cine este în măsură să evalueze mai bine performanțele de comunicare publică, validitatea strategiilor? O pot face mai bine persoane sau departamente din interior, care cunosc profilul instituțiilor, mecanismele politicilor publice adoptate adică au informații din interior, de la sursă, sau este mai bine să se recurgă la un audit extern, la specialiști în comunicare din afara instituțiilor care pot avea o perspectivă mai largă, de ansamblu asupra mediului social în care comunică organizația deși au acces mai redus la informații din interior? Se poate aprecia că o evaluare externă, produsă de echipe independente, profesioniste și neimplicate în designul strategiilor de comunicare instituțională poate avea o mai mare valoare și obiectivitate față de o evaluare internă. Economistul, politologul și psihologul american Herbert Alexander Simon, laureat al premiului Nobel în economie, are o teorie despre raționalitatea limitată de care dispun oamenii în luare deciziilor. Conform teoriei lui, cei care iau deciziile într-o organizație nu au în cele mai multe cazuri toate informațiile necesare pe care să-și bazeze deciziile, și chiar dacă le-ar avea, eșecurile de raționament împiedică de multe ori luarea hotărârilor optime (Simon, 1997). Teoria sa asupra raționalității limitate a avut aplicații importante în economia și psihologia organizațiilor. Deoarece situațiile decizionale la nivel administrativ instituțional sunt complexe, informațiile incomplete și variantele multiple, orientarea spre cele mai bune decizii ar trebui făcută prin limitarea subiectivității pe cât de mult posibil. Altfel, o înclinare a analizei proceselor de comunicare înspre auditori externi și echipe de analiști neimplicați în organizație ar putea aduce un plus de obiectivitate în această privință. Referindu-se la evaluarea comunicării organizațiilor, Wally Olins este de părere că următoarele aspecte importante trebuie avute în vedere la auditare: „Auditul de comunicare examinează ceea ce spune organizația, cui, cum și dacă folosește un ton consecvent. De asemenea, examinează dacă organizația își ascultă propriii oameni și pe cei din afară...” (Olins, 2004, p.49). Tot în ceea ce privește auditurile de comunicare se estimează că „întreaga activitate de comunicare a unei organizații ar trebui evaluată cel puțin o dată pe an pentru a se asigura că audiențele primare și secundare primesc mesajele potrivite. David Hilton-Barber, fost președinte al Public Relations Institute of South Africa, sublinia:

*Cele mai importante motive pentru un audit sunt: să ajute la stabilirea obiectivelor de comunicare, să evalueze programele pe termen lung, să identifice punctele tari și slabe și să evidențieze zonele care necesită activități suplimentare.*

Un control al comunicării, ca o evaluare a întregului program de comunicare al organizației, poate include următoarele:

- Analiza tuturor activităților de comunicare – buletine informative, memo-uri, strategia companiei, rapoarte anuale, broșuri, schema posturilor, liste de corespondență, forme de organizare a personalului, liste de contacte media, contacte cu persoanele de la recepție, grafică, logo-uri, reclame, holuri de așteptare pentru vizitatori, și așa mai departe.
- Interviu neoficial cu angajații obișnuiți, cu managementul mijlociu și cu directorii.
- Interviu neoficial cu liderii comunității, redactorii șefi, consumatorii, distribuitorii și alte persoane influente din industrie.

Un număr de tehnici de cercetare [...] pot fi utilizate în timpul auditurilor, inclusiv chestionare prin poștă, sondaje telefonice, focus-grupuri și așa mai departe. Punctul cel mai important este ca întregul proces de comunicare al unei organizații ar trebui analizat din toate unghiurile posibile, pe baza informațiilor primite din partea cât mai multor categorii de publicuri” (Wilcox & Agee, 2009, p.203).

## **Concluzii**

O democrație relativ tânără, așa cum este cazul societății românești contemporane, are nevoie de instituții publice care să fie nu doar puternice și bine definite, ci și legitime, pentru ca populația să simtă că acestea lucrează în serviciul și folosul ei. Legitimitatea instituțiilor publice poate crește dacă acestea conștientizează importanța unei bune comunicări cu societatea pe care o deservesc.

Reglementarea legală a acestei comunicări și transparențe publice este de maximă importanță, dar nu reprezintă totul. Așa cum s-a văzut din scurta trecere în revistă de mai sus a reglementărilor legale, legislația privind transparența și comunicarea publică a instituțiilor există, și este suficient de cuprinzătoare și bine articulată. Este însă nevoie de a da o atenție crescută monitorizării felului în care ea este aplicată și respectată. Evaluări ulterioare și continue în această direcție pot fi de interes și pot evidenția lacunele ce trebuie corectate.

Pe lângă respectarea și monitorizarea aplicării legislației privind comunicarea publică, există și alte aspecte care pot fi îmbunătățite în această privință: instituțiile publice pot avea strategii de comunicare socială mai bine armonizate și articulate, aspect cărui i s-a dat insuficientă importanță. Raportul cost/beneficiu poate fi considerabil optimizat. Comunicarea publică a companiilor private poate reprezenta o bună sursă de inspirație, și totodată model de bună practică, ținându-se cont, desigur, de caracteristicile diferite ale sectorului privat față de cel public și de resorturile diferite care inițiază comunicarea. Cercetări ulterioare, aplicate și extinse, ar putea evidenția ce anume poate fi preluat și adaptat din sectorul privat pentru modelele de comunicare în sectorul public.

Evaluarea comunicării publice trebuie să se constituie într-un demers permanent și rațional structurat. Este necesar a fi clar stabilit cine face această evaluare, iar apelarea la auditori externi, profesioniști în domeniul evaluării comunicaționale poate constitui o variantă de luat tot mai serios în considerare.

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# ASSESSING DIGITALIZATIONS' IMPACT ON MEDICAL STAFF AND PATIENTS: THE PATIENTS' ONLINE SCHEDULING

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**Abstract:** *Digitization of the healthcare sector can increase the well-being of millions of citizens and radically change the way medical and patient care services are provided. Digital solutions are not a substitute for classical way to provide medical services. They are a sort of “force multiplier” for caregivers in order to improve the effectiveness of the medical care delivered. Recent patient-centered perspective on medical services needs additional solutions in order to meet high standards in medicine. In fact, the whole medical system is based on the relation between patient and medical personnel. It is critical for the hospital professionals to discover new ways to improve this relation especially in the field of communication. Areas such as online patient scheduling, patients’ secure access to medical recordings, telemedicine platforms, digitization of medical reports, educational portals designed for patients could consolidate the relation mentioned above. On the other hand, there are external demands and pressures in order to accelerate digitization process. This could raise the following questions: are caregivers and patients ready for digitization? We can find the answer to this question by conducting social impact assessments on both, medical staff and patients. The results of these studies will help to forecast the consequences of digitization process, and to find the best ways to make its implementation as efficient as possible. I will try to answer this question using a research in Cluj County Clinical Emergency Hospital, one of the largest Romanian public hospitals, related to patients’ online programming.*

**Keywords:** digitization, patient, medical care, hospital, communication.

## Introduction

If in 2019, others were considered the main problems facing the country and the European Union, respectively, rising prices, inflation, daily cost of living -32% - and the health care and social security system - 19 %, currently about four out of ten Romanians and Europeans consider that the main problem they face is health (both at national level - RO: 43%, EU27: 44% - and European - RO: 39%, EU27: 38%) (Eurobarometer, winter 2020-2021).

One of the main consequences of the crisis triggered by the spread of the new Coronavirus was the restriction of access to medical services as a measure of protection against infection with this type of highly contagious virus. As a result of this measure, most of the chronically ill people, beneficiaries of specific periodic medical services (oncological treatments, dialysis, etc.) were extremely tried and exposed to the risk of infection. Also, patients who developed conditions other than those caused by COVID-19, did not have access to medical services, except for very serious emergencies. In this context, the importance of providing distance medical services has greatly increased, especially in terms of communicating patients (insured persons) with family doctors. The absence or insufficient development of services based on new communication technologies is one of the main lessons learned by now for both the beneficiaries of medical services and the health system.

Digitization can benefit both patients and consumers of health services, as well as health professionals and the health system itself. The digitization process can bring more information to citizens; can strengthen the side of responsibility and prevention. Through new communication technologies, access to medical services becomes easier. Another aspect is that it is easier to exchange information between the patient and the healthcare staff. Telemedicine

is based on this exchange of information, the new challenge that the information society brings in the field. Last but not least, this exchange of information facilitates medical research, which is absolutely necessary in the effort to identify new medical procedures and treatments.

The present research aims to achieve an objective radiograph of the state of implementation of new Internet-based communication technologies in the public health system, in general, and at the Cluj County Emergency Clinical Hospital (SCJU), in particular. I will follow the main trends in the digitization of health services. I also believe that it is very important to identify concrete ways in which new communication technologies can contribute to increasing the quality of medical care. Last but not least, it is necessary to identify the steps in the process of implementing new technologies in the field, so as to avoid potential blockages in the system. My attention is focused on the analysis of how the digitalization of medical services has an impact on the quality of the medical act, which are the main medical services that can be qualitatively improved by digitization, which are the steps for an implementation that brings positive effects and reduces the scope negative effects.

## **Literature review**

### **Digitalization of the health system as a critical requirement**

Communication technology is fundamental for society; each technology makes its mark on the form and content of the media. The use of communication technology influences social transformation and communication revolutions lead to social revolutions (McQuail, D., 2010, p.143). We are living the times when there is a real external pressure (in the good sense of the word) in order to accelerate the digitization process and the interconnection with the platforms of other public institutions, achieving the goal of digital governance. COVID-19 has turned digitization from a “nice to have” to a “must have” for many organizations, forcing them to adapt and modernize quickly in order to keep their operations running (Caldwell, J.D., Krishna, D., 2020).

The doctor-patient relationship is the foundation on which the entire medical system is built. All the other processes that take place in the medical system are complementary to this relationship. The ways the communicative, social and clinical practices work together in the complex context of the hospital departments defines the overall quality of the experience for patients and the ultimate work satisfaction of clinicians (Slade, D.et all., 2014).

Digital solutions do not aim to reduce the importance of the doctor (medical staff) - patient relationship, they cannot be a substitute for medical staff (in certain areas of economic and social life digitalization technology can replace the human presence). On the contrary, digital solutions can be a “force multiplier” for the doctor-patient relationship. For the activity of a public hospital the degree of patient satisfaction is a very important indicator. All actions taken by the hospital and all development projects must be part of the overall effort to improve the quality of these services. It is obvious that public hospitals need modernization and transformation.

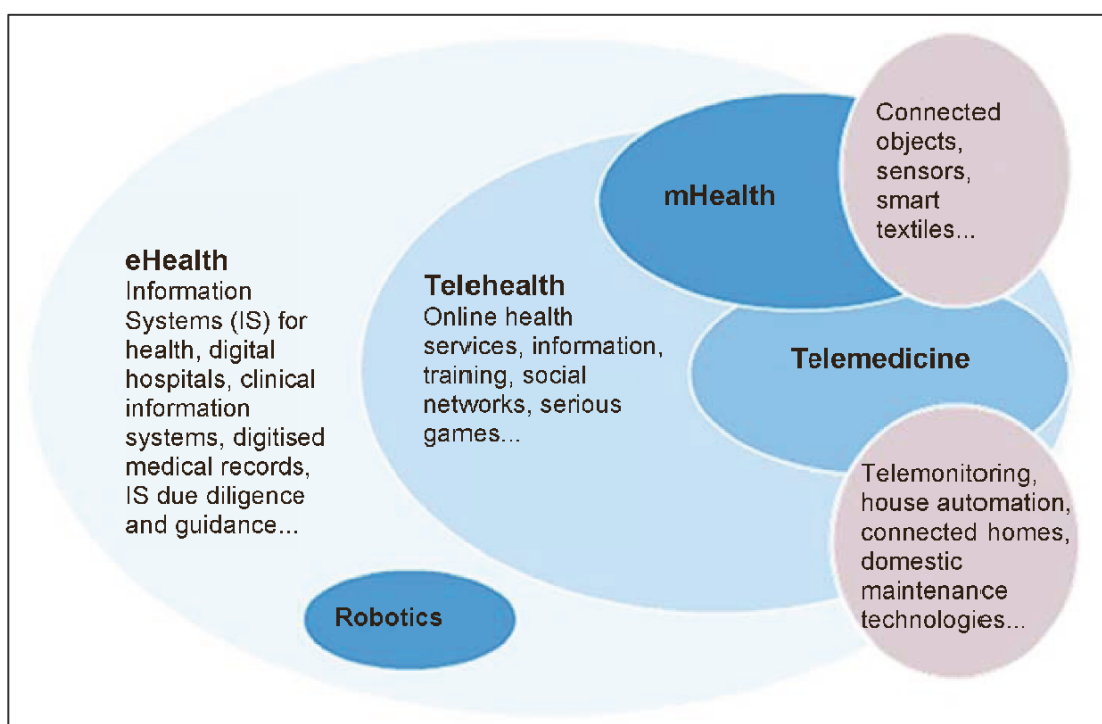
Digital hospital transformation solutions can radically change the way medical services are provided. Tomorrow’s healthcare information systems will not only provide data faster and cheaper; automated healthcare *is* and *it* will provide decision support to improve the accuracy of physician diagnosis and the outcomes of nursing care management (Coile, R.C., 2002, p.46).

### **The European perspective on the digitization of health services (eHealth)**

According to European Economic and Social Committee, in the context of the digital revolution in healthcare, it is essential to maintain and promote health insurance systems for the benefit of all, in solidarity, in favor of inclusion and non-discrimination. Indeed, the inclusion and fair access for all citizens to and access to quality healthcare services (digital or not) are the conditions for universal health coverage (EESC, 2017). From the first research in the field,

regarding the use of digital technologies in health, he showed that, after direct discussions with the doctors and discussions with the nurses, the Internet ranks third in a hierarchy of health information sources (Lupiañez, F., Maghiros, I., Abadie, F., 2013).

Digital health services are defined as partially or fully digitized health services - they use digital elements to achieve their purpose and ideally should increase access to health services, their quality, equity, cost-effectiveness, sustainability and innovation in systems of health. Digital health services include services such as eHealth, mHealth, telemedicine, telecare, imaging, artificial intelligence, electronic health records. Digitization influences health promotion, prevention, primary care, long-term social care and self-care. Mobile health services (mHealth) are examples of digitization with a positive impact on the health of the population, including asthma treatment and smoking cessation, including in low- and middle-income countries (EESC, 2017).



**Fig.1. Diagram of eHealth services (source: EESC, 2017)**

The EU digital health approach comprises what is known as ‘4P medicine’: participatory: medical data are produced and followed up on by the patients themselves, assisted by a growing number of connected devices. The relationship between patients and doctors (who are no longer the only source of medical knowledge) is changing. The patient is becoming a ‘patient-actor’; preventive: patients who systematically collect information on their health are increasingly aware of the need to stay healthy, which opens the door to healthcare with a stronger focus on prevention; personalised: the constant flood of increasingly specific and varied personal data also lays the groundwork for more personalised healthcare; predictive: lastly technological progress, making it possible, for example, to digitise people’s complete genome, is opening the door to healthcare which aims to be increasingly predictive.

Regarding the way ahead, the expert group for EU member states recommendations are: developing a strategy for digital transformations, developing a framework for monitoring and evaluating the effects of digitization on medical systems, investing in schematic evaluation procedures, investing in evidence-based measures and methodology, evaluation, investing in change monitoring, supporting decision-making at the local level, creating an environment to



support and adopt technological innovations, setting up a body to monitor and evaluate progress (EU, 2019).

### **The national and local approaches on health digitization**

Unfortunately, Romania does not have an authority in charge with eHealth policy coordination. National Strategy on Digital Agenda for Romania 2020 (approved in 2015) contains a section dedicated to the field of digital health transformation. Currently, Romania has a Single Integrated System (SUI), a solution that aims to more efficiently manage the Single National Health Insurance Fund by collecting online and processing in real time all the medical information of the insured patients. Romania has implemented the following IT systems specific to the medical sector: a classification system by diagnostic groups, an electronic prescription system, health insurance card system, the electronic patient record management system. The implemented measures had an important impact in the direction of improving the services provided to patients and making easier the work for health professionals.

There are still many challenges related to digitalisation in the field of health (legislative restrictions, lack of adequate infrastructure, data protection risks, limited access to data, inability to verify the authenticity of information sources, resistance to change), but all these must be addressed by through a collaboration between all stakeholders, authorities, industry, health professionals.

Also, education in this area is essential in order to overcome the current paradigm that characterizes our health system in favor of patient-centered care, a patient who has the capacity and resources to make informed decisions about their own health.

At the local level, Cluj-Napoca Digital Development Strategy emphasizes 3 directions of action: digitization of personal information related to health and integration with the digital identity of the inhabitants of Cluj-Napoca, digital transformation of services health - digitization and connection of various components of the local health system, and digitization and management data relevant to the state of health - environment, urban planning, air, water, soil quality, demographics, green spaces (FSPAC, 2021).

On the other hand, according to a study of Pricewaterhouse Coopers, in 2018, in Romania the level of digital education is low, Romanians using the Internet especially for accessing social networks and entertainment. In addition, Romania faces a large gap between urban and rural areas, in terms of broadband internet technology infrastructure (only 40% coverage in rural areas) (PwC, 2018). Romania is among the last countries in the rankings made by the studies mentioned above, as follows: 67th place out of 193, according to the UN study, but on the last place in EU member countries; 28th place out of 28, according to the DESI report; 54th out of 63, according to the IMD World report, being the penultimate place in EU member states

### **Methodology**

The most effective way to identify the implications of the digitization process in the public health sector is to apply the impact study method. This method is defined as the process of identifying the future consequences of an ongoing or future action that is related to individuals, organizations, or macrosystems (Becker, 2001).

The methodology of the impact assessment is based on the fact that any action is taken to mitigate the consequences or eliminate a problem, and the problem is, in fact, the discrepancy between a current situation and a desired situation.

This research aims to analyze the influence of the implementation of online patient appointments on the public health system and the stage of implementation of this process using the sociological methodology of applying the online questionnaire at the beginning of the implementation period and at the end of the implementation period and organizing discussions



discussions according to the Focus group model, in which to participate the main actors involved in the implementation and the representatives of the patients' NGOs.

The research aims to reach the following general objectives: identifying patients' expectations related to the implementation of online scheduling, identification of the way in which the medical staff perceives the process of implementing the online scheduling of the patients, identification of positive and negative effects, and finding solutions to decrease the negative effects.

Main questions and assumptions:

Q1: Is the hospital ready for the implementation of online patients scheduling?

Hypothesis: online patients scheduling will contribute to the improvement of health services and will be a useful tool at the disposal of medical service providers. There is a certain resistance to change on the part of doctors and there is a need for training in the use of new technologies.

Q2: Are patients ready for the implementation of online scheduling?

Hypothesis: The young patient segment (40 years <) will enthusiastically receive the implementation of digitized medical services. In the case of the population segment over 40 years old, they will need to be familiar with new technologies (programs such as “Digital Seniors”).

Part of *baseline analysis* and *system analysis*, it is necessary to make an evaluation of the status of the digitalization in the hospital and of the conditions that can favor the implementation of the online programming of the patients. The main tools in the field of information technology proposed by the Cluj County Emergency Clinical Hospital are: the patient information portal, internal information portal and a telemedicine platform (in initial phase of implementation). The patient information portal is hosted by the hospital's website and its main purpose is to facilitate the interaction between the hospital unit and patients. This portal offers useful information about the hospital, having as sections a digital library with general information about different diseases, information about appointments and access to the different sections, compartments and analysis laboratories. The patient satisfaction questionnaire, also hosted by this section, is a useful tool for gathering patients' opinions after accessing care services within the Cluj County Emergency Clinical Hospital. A very useful section is the one dedicated to chronic patients who can upload medical documents following a specific link. Specialist doctors have the opportunity to formulate a first medical opinion before consulting the patient.

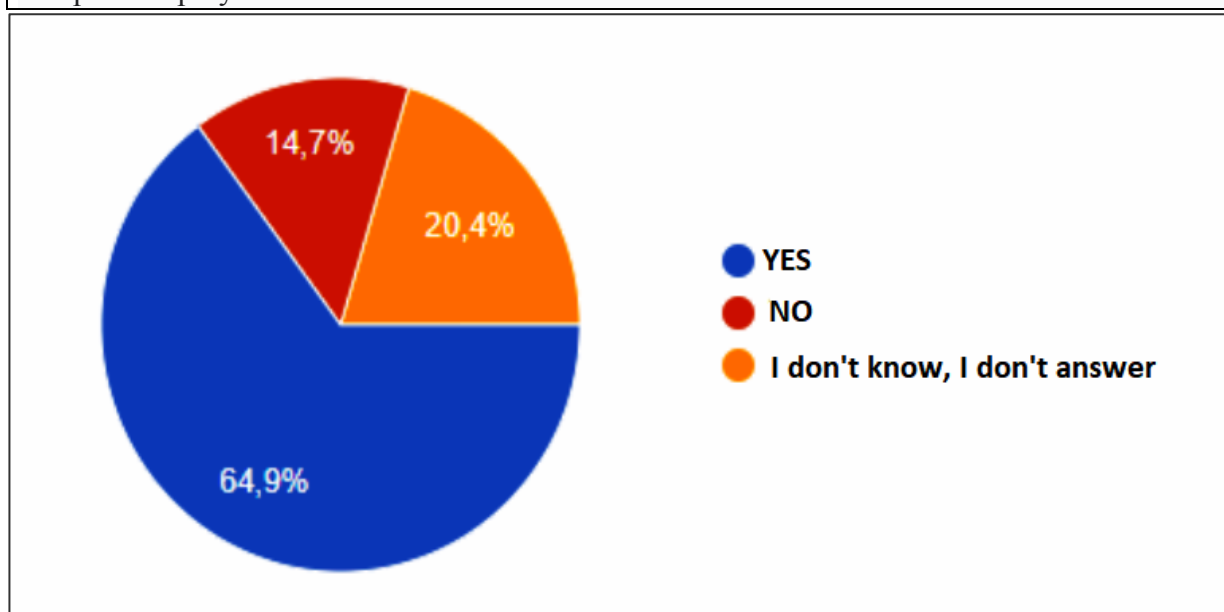
Internal information portal is document management system (ATLAS MED) addressed to all departments and employees of the hospital and includes documents of any kind for their organization in a flexible and unitary computer system, easy to track and manage, from registration, distribution to archiving. The system allows employees to access information and work together in a unitary and efficient way for the registration, distribution and resolution of documents.

The Cluj-Napoca County Emergency Clinical Hospital provides potential patients with an application through which they can access medical consultations through a telemedicine platform. The *ClujMedApp application* is currently available for Android phones. The process involves installing an application on the phone, creating an account and registering it on the platform provided by the hospital. The user of the application has the possibility to manually upload his biometric data from the application. At the time of the call, the responding operator - an emergency physician - will have access to all biometric data entered by the patient. The users of the application can call the UPU operators-doctors daily, between telemedicine platforms 10.00-12.00. The ClujMedApp application was developed by the Dutch company Spectator Healthcare, in partnership with CLUJ IT Hub and the Cluj County Emergency Clinical Hospital and is part of the large telemedicine project developed by the hospital since 2019.

In order to *analyze the trends* in the field of digitalization of health services, we used the results of the study conducted at the level of the European Commission in 2019. Decisions to adopt, use or reimburse health services that include digital technologies are ideally based on proof of performance and on obtaining a quality, efficient and equitable medical act.

The *analysis before implementation* was done by applying the hospital staff to the “ante” questionnaire online (see Figure 2). The results of the questionnaire were tested with the help of the conclusions of the discussions organized with the medical, administrative and technical staff with key functions, according to the Focus group rules. The electronic InfoPost system was used to find out the patients' opinion related to the subject of implementing online appointments. The data collected through the InfoPost system were compared with the results of the Patient Satisfaction Questionnaire.

Q: Do you think the online patient scheduling will contribute to the development of the hospital and the creation of better working conditions for Cluj County Emergency Clinical Hospital employees?



**Fig. 2. Employees' opinion on online scheduling (source: SCJU Online survey, 2020)**

The results of online survey are summarized in Figure 2. More than 70 percents of hospital patients agree with the idea of online scheduling implementation. The focus group discussions concluded: implementing patients online scheduling would reduce costs and make more efficient use of hospital resources, the internal information portal (ATLAS MED) is ready to communicate with patient online scheduling portal, and a training program dedicated to hospital staff that will make online scheduling is required.

The *analysis after implementation* will be done by administering the Patient Satisfaction Questionnaire and by applying the hospital staff the “ex” questionnaire online. In order to see the opinion of the medical staff regarding the newly implemented technologies, a Focus group type debate will be organized within the Medical Committee of the hospital.

## Conclusion

Both patients and hospital staff believe that the implementation of the online patient scheduling system is more than necessary, as part of the digitization of the services offered by Cluj County Emergency Clinical Hospital. Implementing patients online scheduling would reduce costs and make more efficient use of hospital resources.

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# ENTREPRENEURIAL INTENTIONS OF EMERGING ADULTS IN ROMANIA. RESULTS OF A LONGITUDINAL STUDY

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**Abstract:** *Entrepreneurship is an important way to enter the labor market, being an accessible career even to young people. This paper aims to investigate the process of choosing a career as an entrepreneur among high school graduates. Based on the opinion of 854 young people who answered an online questionnaire in a longitudinal sociological study, we show how interested young people are in starting a new business in 3 important moments of their transition to adulthood and what is the profile of young entrepreneurs at 8 years after graduating from high school. As they get older, young people are more likely to think about starting a business. From 34.7% of those who stated in the 12th grade, their intention to start entrepreneurship increased to 39.9% after 8 years from high school. Although only 5.2% of the young people in the sample, whose average age is 25, launched a new business, we can affirm that their profile shows that they are mostly people from urban areas, male and without family responsibilities.*

**Keywords:** youth, entrepreneurship, entrepreneurship education, longitudinal sociological study

## Introduction

Entrepreneurship can help to make better use of the economic potential of young people and also reduce the level of poverty. In many places around the world, youth entrepreneurship is increasingly seen as a promising solution to various economic challenges, such as joblessness and declining economic development in rural areas and / or developing countries. Absolute unemployment is a common problem worldwide (Mandyoli, Iwu and Nxopo, 2017). Entrepreneurship can be one of the key factors in the economic development of countries and can contribute to reducing youth unemployment (Acs, Audretsch, Braunerhjelm and Carlsson, 2012; Ndou, Mele and Del Vecchio, 2019). Entrepreneurship among young people is an important area of research that deserves more attention so far as it reaches policy makers to take the necessary steps to encourage young people to turn to business and thus reduce the youth unemployment rate (Sieger, Fueglistaller and Zellweger, 2016). Entrepreneurial intentions were considered one of the most important precursors of entrepreneurial behavior. (Tsai, Chang and Peng, 2016)

More and more countries have invested in various entrepreneurial skills training programs among young people. In order to prepare young people to face a constantly changing society, it is necessary to cultivate leadership, through hours of entrepreneurial education and extracurricular activities, in order to always exercise the spirit of initiative among young people (Romania Educated, 2020, p. 112). Moreover, to personalize learning, to put into practice research-based science learning, problem-based learning/projects to the detriment of memorization, it involves the cultivation of innovation, creativity and entrepreneurial initiatives

among young people, by creating opportunities to stimulate interest through various experiments, projects and simulations (Romania Educated, 2020, p. 41). In Romania, one of the reasons for the low attractiveness of students for vocational and technical education is the lack of an infrastructure adapted to training needs, which supports innovation, creativity and entrepreneurship, so it is necessary to include entrepreneurship education in the curriculum at national level, 2020). At university level, postdoctoral study programs have been implemented in several university centers for the development of entrepreneurial skills of young researchers. Furthermore, throughout the years, various approaches have been used to encourage young people towards entrepreneurial activities, such as opening research and innovation hubs, providing bank loans, commercial facilities and access to finance (capital) to influence young people's career choices in this direction as well. In Romania, the national Start-Up Nation program gave young people the opportunity to present their business proposals based on the preparation of a business plan, and based on a selection they have the opportunity to finance their business ideas with the support of Government. These approaches have been used to test the entrepreneurial readiness of young people.

The aim of this study is to follow the intentions of young Romanians to follow the path of entrepreneurship during the last years of high school. Based on a longitudinal sociological study, we show how young people's interest in starting a business has evolved and some of the subjects in the initial sample have come to put into practice the desire to become entrepreneurs, 8 years after graduating from high school, by starting a business.

### **Literature review/Theoretical framework**

The Theory of Planned Behaviors (TPB) is frequently used to explain the entrepreneurial intentions of individuals using three factors: attitude towards behaviors, social norm and control of perceived behavior (Dioneo-Adetayo, 2006; Holmgren & From, 2005; Koe et al., 2012; Ozaralli & Rivenburgh, 2016; Sharma & Madan, 2014). Attitudes toward behaviors refer to “the extent to which a person has a favorable opinion of entrepreneurship” or how they perceive the advantages and disadvantages of entrepreneurship (do Paço, Ferreira, Raposo, Rodrigues, & Dinis, 2011; Krueger et al., 2000; Tkachev & Kolvereid, 1999). The social norm refers to the “social pressure to perform or not”, which is influenced both by the culture of the business environment and by the attitudes of other people such as family, friends, colleagues, etc. (Kolvereid & Isaksen, 2006; Yordanova & Tarrazon, 2010).

Planned Behavior Theory also stipulates that behaviors could be more attractive if there were more expectations and pressures. Perceived behavioral control refers to the degree to which individuals feel they have the ability to perform a behavior. It refers to whether individuals know how to perform the behavior and their experiences or their conception of the obstacles that may arise at the time of the behavior (Dioneo-Adetayo, 2006; Holmgren & From, 2005; Koe et al., 2012; Ozaralli & Rivenburgh, 2016; Sharma & Madan, 2014). In addition, other studies highlight other factors that may be associated with entrepreneurial intentions, such as attitudes toward money (Schwarz et al., 2009), desire for success (Hansemark, 2003), entrepreneurship education (Johansen & Schanke, 2013; Paço, Ferreira, Raposo, Rodrigues, & Dinis, 2011), experiences with entrepreneurship (Basu & Virick, 2008), business environment and creativity (Wennberg, Yar Hamidi, & Berglund, 2008).

Studies have shown a link between personal intentions and the decision to start a business (Ozaralli and Rivenburgh, 2016). The entrepreneurial intentions of young people could be developed through appropriate and regular training sessions, as well as by launching support policies. However, the factors that can influence entrepreneurial intentions also vary depending on different individual, social, cultural and environmental differences (Dioneo-Adetayo, 2006; Holmgren and From, 2005; Koe et al., 2012; Ozaralli and Rivenburgh, 2016 ; Sharma and Madan, 2014).

In Romania, according to the total number of employees, micro-enterprises have increased slightly in the last 5 years, while small and medium-sized enterprises have decreased. Among SMEs, in 2019, 89.82% were micro-enterprises, they had less than 10 employees each, 8.44% were small companies (10-49 employees), and 1.42% were medium-sized companies (50-249 employees) (Table 1). Although the Government has stimulated their growth through programs such as Start-Up Nation, according to the number of SMEs with a population of 1000 inhabitants, we are at the bottom of the list in the EU, and 80% of them are decapitalized. In order to support entrepreneurs at the beginning of the road, to stimulate the decrease of the unemployment rate and the increase of new jobs, the Ministry of Investments and European Projects plan to start other programs such as the "Student INNOtech" Program to support students' entrepreneurial initiatives, with an emphasis on information technology, but also other programs for other categories of people to encourage entrepreneurship (Romanian citizens in the diaspora who want to return to the country, to support start-ups in sports, etc.).

**Table 1. Evolution of the share of SMEs by the total number of employees in the last 5 years**

<i>Size class</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>
<i>0-9 people</i>	88.63 %	88.82 %	89.27 %	89.67 %	89.82 %
<i>10-49 people</i>	9.34 %	9.17 %	8.81 %	8.52 %	8.44 %
<i>50-249 people</i>	1.67 %	1.67 %	1.57 %	1.49 %	1.42 %
<i>Total</i>	513989	527930	553936	576684	591397

Source: *National Institute of Statistics, Tempo Online Database*

Entrepreneurship competence refers to the capacity to act upon opportunities and ideas, and to transform them into values for others. It is founded upon creativity, critical thinking and problem solving, taking initiative and perseverance and the ability to work collaboratively in order to plan and manage projects that are of cultural, social or financial value (EC, 2019: 13). Entrepreneurial education among students increases their chance to develop a start-up at some point in life. Students participating in entrepreneurship education courses are 3 to 6 times more likely to open a business later, at a certain point in life, compared to those who do not benefit from entrepreneurship education. Opportunity identification, motivation, resources and ability are components of start-up process of new business venture. Entrepreneurship training is a factor that can influence the relationship between ability and entrepreneurial readiness. Students that participated in entrepreneurship training are highly motivated and are more pronounced to set up new business and students who did not participate in entrepreneurship training have low motivation (Seun, 2017).

Resilience is an extremely useful skill in the current context. The greater the resilience of individuals, the lower their dependence on certain sectors of the labor market, and the easier they will be to adapt to rapid social or economic change. In order to develop educational resilience, it is necessary to modernize vocational and educational upbringing so as to support the development of entrepreneurial skills for young people, but it is also necessary to promote lifelong learning by stimulating "life" skills among adults (Romania Educated, 2020: 109). Starting with the 2020-2021 school year, the Romanian Ministry of Education introduced entrepreneurship education as an optional subject in middle and high school education by signing the "Pact for Entrepreneurial Education" (MEN, 2019).

Two out of three young Romanians have an appetite for entrepreneurship, and one in two young people desires to be an entrepreneur or manager (MEN, 2019). Young people want to start a business in certain fields. One in three would opt for advertising, public relations,

marketing or sales. A career in IT, Software, Hardware, artificial intelligence or game development ranked 3rd in the preferences of young Romanians, with a percentage of 29%. On the other hand, only 14% of young people fancy to start a career in tourism or HoReCa, a percentage similar to that of young people who want to start a career in media, TV or journalism (Izidata, 2021). In order to develop a business, young people consider that they must first like the field. It is also important that the business has a positive impact on society and only in third place, to produce high profits (Izidata, 2020). Of those who want to start a business, about 41% of respondents say that the main reason is independence or increased source of income. Only one in seven young people considers entrepreneurship mainly as a development of skills and abilities (Sandu, Stoica, Umbreş, 2014: 90).

Researchers argue that young people may be especially prepared to become entrepreneurs because of the lower risks they face in the early stages of their professional careers (Hulsink and Koek, 2014). Young people may have unique attitudinal and motivational strengths, such as greater adaptation to new information and technology compared to their older counterparts (Minola and Criaco, 2014). The low level of insufficiently opened and exploited business opportunities (those according to the niche market) around the world is due to the lack of skills needed to conduct entrepreneurial activities (Barringer; Ireland, 2015). Other factors were identified, such as the motivational level (Ekpe, Razak, Ismail, Abdullah, 2015) and the low levels of young people participating in entrepreneurship training. Peterman and Kennedy (2003) argue that participation in entrepreneurship training programs has a positive influence on young people's desire to start a business.

Young people need motivation, either through funding or other support mechanisms from all stakeholders: government, entrepreneurship promoters, family and friends, for the dream business to become a reality. The issue of access to resources such as capital and motivation are still concerning for which many young people are not prepared to take the risk of becoming entrepreneurs. To revitalize rural communities in the United States, researchers, policy makers, and program developers are increasingly encouraging local entrepreneurship. In order to reduce the number of young people leaving rural communities in the USA, it is necessary to involve young people in local business. Both young people and business owners recognize the potential of young people to get involved in local business through the unique spirit and talent that young people can bring to local economies (e.g. the ability to work with technology) (De Guzman et al., 2020 ).

Although students may have quite favorable attitudes towards choosing a career as an entrepreneur and even if they feel supported by the people around them, if their knowledge for starting a business is not developed during university studies, the chances of choosing such a path are smaller (Gonzalez-Serrano et al., 2021). Personal factors such as gender, age, values and attitudes towards work shape the entrepreneurial behavior of young people. Also, the educational profile of graduates influences their chances of becoming entrepreneurs, especially the teaching methods used, the number of years of education and the skills acquired (Zamfir et al., 2013).

## **Methodology**

The analyzes presented in this study are extracted from a national research project on the life and future projects of young people "Outcomes of adolescence. A longitudinal perspective on the influences of the social context on successful transitions to adulthood", project PN-II-ID-PCE-2011-3-0543, funded by the National Council for Scientific Research and implemented by the Department of Social Work of the "Babeş- Bolyai" University, Romania. The research is a longitudinal one (according to our knowledge the first study of this type in Romania, started in 2012) on the transition of adolescents to young adult status, as well as identification and analysis of demographic factors related to neighborhood and income, analysis of relationships



with parents, friends and teachers and those social contexts (educational, family, services) that bring benefits in the successful transition of adolescents to young adult status. The results of this research have contributed to the knowledge of how young people see their chances and life problems. Although the project provided only two waves of study, the first in 2012, when young people were in their last year of high school, and the second wave, two years after graduating from school, in 2014-2015, with financial support obtained through the POCU project 123793 "Researcher, future entrepreneur - New Generation" managed to collect data from a third wave, between 2019-2020. The research method was a sociological survey based on a self-administered online questionnaire. The young people were contacted by phone, on the social networks Facebook and WhatsApp and on their e-mail addresses. They were asked to complete an online questionnaire on the website <https://www.viitoradult.ro/en/> with questions that capture various aspects of the transition from adolescence to adulthood.

**Table 2. The socio-demographic characteristics of the sample**

Socio-demographic data of respondents between the 3 waves of the study		First wave 2012-2013		Second wave 2014-2015			Third wave 2019-2020			
		No.	First wave %	No. <sup>1</sup>	Second wave %	(%) <sup>2</sup>	No. <sup>3</sup>	Third wave %	(%) <sup>4</sup>	(%) <sup>5</sup>
Gender	Girls	2043	58.2	891 (-1152)	59.0	43.6	521 (-1522)	61.0	25.5	58.5
	Boys	1466	41.8	618 (-848)	41.0	42.1	333 (-1133)	39.0	22.7	54.0
Mean age		18.00 years		20.02 years			25.07 years			
Residential Area of High School	Urban	2962	85.7	1389(-1573)	92.4	46.8	798 (-2164)	93.4	26.9	57.5
	Rural	493	14.3	114 (-379)	7.6	23.1	56 (-437)	6.6	11.4	49.1
Material deprived family		610	19.5	236 (-374)	16.6	38.6	117 (-493)	13.7	19.2	49.6
Total		3509		1509		43.0	854		24.3	56.6
<sup>1</sup> no. of young people from the second wave, less than in the first wave of the study										
<sup>2</sup> percent of the young people from the total initial sample who submitted the questionnaire in the second wave										
<sup>3</sup> no. of young people from the third wave less than in the first and second wave of the study										
<sup>4</sup> percent of the young people from the total initial sample who submitted the questionnaire in the third wave										
<sup>5</sup> percent of the young people from the second wave who submitted the questionnaire in the third wave										
Source: Author's own conception										

Table 2 describes the socio-demographic data of the 3 waves of the study. The initial sample with which the study began included 3509 high school students of the 12th grade (58.2% girls, 41.8% boys), the average age was 18 years, most being high school students in urban areas 85.7%, and 14.3% studied in rural high schools. The second wave of the study, conducted two years after graduating from high school, included 43% of the young people in the initial sample. Most girls, 59%, and 41% boys, average age 20.02 years, most high school graduates in urban areas 92.4%, and 7.6% high school graduates in rural areas. The group of the third wave of the study included 24.3% of the young people in the initial sample, started 8 years ago, the majority being 61% girls, and 39% boys, the average age 25.07 years, most high school graduates in urban environment - 93.4%, and 6.6% were graduates of a high school in rural areas.

## Results and discussions

As they get older, young people are thinking more and more about starting a business. If in the first wave of the study, when young people had an average age of 18, 34.7% of them said they were considering starting a business, in the second wave, when the average age was 20.02 years, 32.3% had kept their option, and in the third wave, when the average age is 25.07 years, almost 40% of young people say that they plan that short-term plans (the next two or three years) also involve starting their own business.



**Table 3. The entrepreneurial intentions of young people in the 3 waves of the study**

<i>Research stages</i>	<i>1<sup>st</sup> Wave</i>		<i>2<sup>nd</sup> Wave</i>		<i>3<sup>rd</sup> Wave</i>	
<i>Age average</i>	18 years		20.02 years		25.07 years	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Yes	273	34.7	263	32.3	314	39.9
No	249	31.6	177	21.8	126	16.0
I do not know	265	33.7	314	38.6	271	34.5
Not necessary	-	-	59	7.3	75	9.5
<b>Total</b>	787		813		786	

Source: Author's own conception

The results show a significant difference between boys and girls. Boys are more inclined to think that they will create their own business compared to girls.

**Table 4. The entrepreneurial intentions of young people in Wave I according to gender**

<i>1<sup>st</sup> Wave</i>	For the next two or three years, do you plan to start a business?					
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>	
<i>Gender</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Girls	136	28.4	159	33.2	184	38.4
Boys	137	44.5	90	29.2	81	26.3

Note:  $hi^2=23.09$ ;  $df=2$ ;  $p=0.001$

We notice a significant difference between boys and girls, boys being more inclined to start a business, compared to girls. The results of the second wave of the study show that among boys, 42.2% plan to start a business, while of girls only 26.2% plan to open a business in the next 2-3 years.

**Table 5. Entrepreneurship intentions of young people in Wave II by gender**

<i>2<sup>nd</sup> Wave</i>	For the next two or three years, do you plan to start a business?							
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>		<i>Not necessary</i>	
<i>Gender</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Girls	131	26.2	117	23.4	212	42.4	40	8.0
Boys	132	42.2	60	19.2	102	32.6	19	6.1

Note:  $hi^2=22.55$ ;  $df=3$ ;  $p=0.001$

The data show a significant difference between boys and girls, boys being more inclined to start a business, compared to girls. In wave 3 of the study, among boys, 45.5% think of starting a business in 2-3 years, while 36.3% of girls take this into account. If we look longitudinally, the data show that as we get older, both girls and boys are thinking more and more about starting a business. Thus, in the case of girls the option to start a business increases from 28.4% at the end of high school to 36.3% at 8 years after graduating high school, and in the case of boys, from 44.5% at the end of the 12th grade to 45.5% 8 years after graduating from high school.

**Table 6. Entrepreneurship intentions of young people in Wave III by gender**

<i>3<sup>rd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not Know</i>		<i>Not necessary</i>		<i>Total</i>
<i>Gender</i>	N	%	N	%	N	%	N	%	%
Girls	173	36.3	89	18.7	162	34	52	10.9	100
Boys	141	45.5	37	11.9	109	35.2	23	7.4	100

Note:  $h^2=11.76$ ;  $df=3$ ;  $p<0.05$

Young people who do not have family obligations are thinking more about starting a business in 2-3 years compared to young people who are married and have children (Table 7 and 8).

**Table 7. Entrepreneurship intentions of young people in Wave III depending on marital status**

<i>3<sup>rd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not Know</i>		<i>Not necessary</i>		<i>Total</i>
<i>Marital status</i>	N	%	N	%	N	%	N	%	%
Unmarried	250	41.0	96	15.7	217	35.6	47	7.7	100
Married	64	36.6	30	17.1	53	30.3	28	16.0	100

Note:  $h^2=11.72$ ;  $df=3$ ;  $p<0.05$

**Table 8. Entrepreneurship intentions of young people in Wave III depending on parenting**

<i>3<sup>rd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not Know</i>		<i>Not necessary</i>		<i>Total</i>
<i>Parental status</i>	N	%	N	%	N	%	N	%	%
No children	287	41.4	104	15.0	250	36.1	52	7.5	100
With children	24	27.0	21	23.6	21	23.6	23	25.8	100

Note:  $h^2=38.98$ ;  $df=3$ ;  $p=0.001$

Young people who want to get a job or change their job next year are thinking about starting a business to a greater extent than those who do not want to get a job or change their job next year (Table 9).

**Table 9. Entrepreneurship intentions of young people in Wave III depending on the desire to get a job / change jobs**

<i>3<sup>rd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not Know</i>		<i>Not necessary</i>		<i>Total</i>
<i>The desire to get a job / change your job next year?</i>	N	%	N	%	N	%	N	%	%
Yes	111	51.4	31	14.4	68	31.5	6	2.8	100
No	104	33.1	61	19.4	100	31.8	49	15.6	100
I do not know	93	38.6	32	13.3	97	40.2	19	7.9	100

Note:  $h^2=41.15$ ;  $df=6$ ;  $p=0.001$

In all 3 waves of the study, young people who graduated from a high school with a technological profile are more likely to start a business compared to young people who graduated from a high school with a theoretical or vocational profile (Table 10, 11, 12).

**Table 10. Entrepreneurship intentions of young people in Wave I in the profile of high school graduated**

<i>1<sup>st</sup> Wave</i>	For the next two or three years, do you plan to start a business?						
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>		<i>Total %</i>
<i>Graduated high school profile</i>	N	%	N	%	N	%	
Theoretical	156	30.3	177	34.4	182	35.3	100
Technological	101	43.7	60	26	70	30.3	100
Vocational	16	39.0	12	29.3	13	31.7	100

Note:  $h^2=13.40$ ;  $df=4$ ;  $p<0.05$

**Table 11. Entrepreneurship intentions of young people in Wave II depending on the profile of high school graduated**

<i>2<sup>nd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>		<i>Not necessary</i>		<i>Total %</i>
<i>High school profile</i>	N	%	N	%	N	%	N	%	
Theoretical	14	26.8	14	26.6	199	37.8	46	8.7	100
	1		0						
Technological	10	44.6	32	13.2	94	38.8	8	3.3	100
	8								
Vocational	14	31.4	5	11.1	21	46.7	5	11.1	100

Note:  $h^2=41.01$ ;  $df=6$ ;  $p=0.001$

**Table 12. Entrepreneurship intentions of young people in Wave III depending on the profile of high school graduated**

<i>3<sup>rd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>		<i>Not necessary</i>		<i>Total %</i>
<i>Graduated high school profile</i>	N	%	N	%	N	%	N	%	
Theoretical	18	36.5	82	16.1	190	37.3	52	10.2	100
	6								
Technological	10	46.8	31	13.4	74	32.0	18	7.8	100
	8								
Vocational	20	44.4	13	28.9	7	15.6	5	11.1	100

Note:  $h^2=17.37$ ;  $df=6$ ;  $p<0.05$

In the second wave we notice significant differences between young people who have lived in urban areas up to 15 years and who planned to start a business to a greater extent than young people who have lived up to 15 years in rural areas.

**Table 13. Entrepreneurship intentions of young people in Wave II depending on the environment of residence**

<i>2<sup>nd</sup> Wave</i>	Do your short-term plans (next 2-3 years) involve... starting a business?								
	<i>Yes</i>		<i>No</i>		<i>I do not know</i>		<i>Not necessary</i>		<i>Total</i>
<i>Residence</i>	N	%	N	%	N	%	N	%	%
Rural	89	32.0	41	14.7	134	48.2	14	5.0	100
Urban	156	32.4	126	26.2	158	32.8	41	8.5	100

Note:  $h^2=24.25$ ;  $df=3$ ;  $p=0.001$

There were no significant differences in the intention of young people to start a business in the next 2-3 years, between:

- those who currently work and those who do not have a job;
- those who have lived for up to 15 years in urban versus rural areas (Valley I and III);
- among those who are active, who volunteer and who do not volunteer;
- between those who come from materially deprived families and who have not had families in a situation of material deprivation.
- among those who graduated from high school in urban areas compared to those who graduated from high school in rural areas.

In terms of employment status, the results of the third wave of the study show that 64.3% of young people (543 people) are employed in private, 19.3%, i.e. 163 people work in the state, 5.2% are private entrepreneurs (entrepreneurs), 0.6% are individual farmers, 2.4% do casual jobs, and 8.2% are engaged in other types of activities. Of the 44 young people who say they started a business, just over half of them are boys, 54.5% and 45.5% (20 people) are girls. Most increased in urban areas, 62.5% and 37.5% in rural areas. Most graduated high school in urban areas, 84.1% and 15.9% of young entrepreneurs are graduates of a high school in rural areas. 56.8% of the young entrepreneurs of the group are graduates of a high school with a theoretical profile, 34.1% have graduated a technological high school, and 9.1% are graduates of a vocational high school. Most come from families that have not been in a situation of material deprivation, 80% and only 20%, 8 young entrepreneurs are among those who grew up in a family in a situation of material deprivation. Regarding parental education, 62.5% of young entrepreneurs in the group have at least one parent with high school education, in the case of 35% at least one of the parents has university / postgraduate studies, and in the case of 2.5% of young people at least one of the parents is either uneducated or has at least a high school education. Most of the young entrepreneurs do not have family obligations, 67.4% are not married, and 84.1% of them do not have children.

## Conclusion

It is necessary for young people to know that entrepreneurial skills are important to be developed, assuming a future existence as a creative, solution-oriented adult. The statistics show that as young people get older, they are considering starting a business more and more seriously. Almost 40% of emerging adults in Romania are thinking of embarking on the path of entrepreneurship. The data are similar to another study which showed that 30% of young people aged between 25 and 29 are quite or very sure that they will start a business on their own in the next two years (Sandu et al. 2014). In the case of both girls and boys, the data show that they are more willing to choose the path of entrepreneurship 8 years after graduating from high

school than immediately after. Significantly, boys intend to start a business more than girls. Young people without family obligations (unmarried and without children), as well as those who want to get a job next year or change jobs, are thinking more about starting a business. Compared to high school graduates with a theoretical and vocational profile, those who graduated from a technological high school intend to start a business significantly more, although the profile of those who even started a business shows that among young entrepreneurs there are more who graduated a high school with a theoretical profile. This could be due to the fact that in our group of subjects there are several young people who graduated from a theoretical high school. The profile of the 44 young entrepreneurs of our group shows that they are mainly male people, without family responsibilities, raised in urban areas and graduates of a theoretical high school in urban areas.

There is a need to encourage entrepreneurship to a greater extent among young people in rural areas because the development of rural communities could be done through local initiatives of young people who have grown up in such environments. Romania has taken the necessary steps to attract and increase the share of young entrepreneurs, both through educational measures that will be implemented in schools and high schools so that entrepreneurship education is more accessible to middle and high school students, and through government support programs financial statements that have been started and others that follow through the following financial years of the European Union, as well as from other extra-community funds. The effectiveness of these measures can be assessed in the coming years, when it will be possible to measure how many young people will choose the path of entrepreneurship and especially how many young people will be able to support themselves in the market.

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# ENVIRONMENTAL ACCOUNTING IN RELATION WITH STAKEHOLDERS - A LITERATURE REVIEW FOR THE PERIOD 2006-2019

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**Abstract:** *Given the continuous development of the social and environmental accounting (SEA) research, the purpose of this paper is to provide new research topics and deepen the existing ones in the environmental accounting discipline. More specifically, this paper analyzes current work from sea research, which can be useful to provide new research questions and develop ideas on the following subjects: contributions of accounting profession to sustainability initiatives from both a constructive and critical perspective, the connections between environmental accounting, stakeholders and accountability and the impact of environmental reporting over stakeholders' decision-making. The articles selected for this literature review are from Clarivate analytics and Scopus.*

**Keywords:** accountability, environmental accounting, stakeholders, sustainability

## **Introduction**

The social and environmental accounting practice has evolved over time. At the beginning, before 1960, „social accounts” have fallen to other disciplines for examination and exploration (Eugenio, Lourenco and Morais, 2010). Then, between the years 1960-1970, social and environmental accounting was defined as a research area which developed through corporate social responsibility and explored relationships between accounting, organizations and society (Parker, 2005). Afterwards, Adams (2004) suggests that in the 1980s there was a domination of labour concerns and an increase in social, environmental and ethical disclosure. Finally, by the 1990s, Gray (2002) highlighted that there is a domination of environmental issues over labour concerns and the disclosures are not so focused on social matters, but rather on environmental questions.

However, even nowadays there is a need in companies for sustainable reporting accounting. Alewine (2010) and Dagiliene and Sutiene (2019) suggest the need for further studies in the field of environmental accounting. Several literature reviews of the social and environmental accounting discipline were done so far. Some authors have made this literature reviews taking together social and environmental accounting (Matthews, 1997; Gray, 2002; Parker, 2005; Eugenio, Lourenco and Morais, 2010; Parker, 2011; Cho and Chung, 2018). Other authors have focused their literature reviews by treating separately the social accounting (Gray, 2002) and the environmental accounting (Ienciu, Matis and Cioara, 2009). Also, there are other authors that have made literature reviews for a sub-discipline like environmental management accounting (Schaltegger, Gibassier and Zvezdov, 2013). The study of Eugenio, Lourenco and Morais (2010) analyzes the papers published from 2000 to 2006, classifying the content into 4 groups: social and environmental accounting systems, regulation impact, social and environmental disclosures and environmental performance. For each group was identified the research method, data origins, industry and country.



Another issue that the paper highlights is the comparison between social accounting and environmental accounting. The authors argue that there is a fuzzy and changing frontier between the two subjects, some arguing that social accounting is part of environmental accounting through sustainability (Gray, 2002). For this study, it will be considered only environmental accounting without social accounting. Environmental accounting represents the reporting and measurement of an organisation's natural environment in order to assist in its discharge of responsibility (Margerison, Fan and Birkin, 2019). It also measures and reports the allocation of environmental resources, risks, costs and expenditures to specific departments, projects, activities or processes from a company, specific firms or industry groups (Dascalu et al., 2010).

Sustainability is a concept that highlights the protection of the abilities of future generations to meet their own needs, without comprising the satisfaction of the needs of today's people. In economic life, each supplier, manufacturer or merchant, while carrying out the normal activities, is also capable of creating negative effects on ecological and social systems. Therefore, companies should contribute to sustainable development through social and environmental initiatives, in all steps of their supply chain, from the acquisition and then transformation of raw materials into the finished products, to the delivery to the final customer (Caliskan, 2014). Sustainability issues are managed just to promote economic efficiency and have control over natural resources and technology (Milne, Tregidga and Walton, 2009). Companies are oriented towards sustainability just for self-interest and to maximize profit, not having in mind to protect natural capital or increase well-being. The connection between accounting and sustainability is determined by weaknesses of traditional accounting. The information disclosed by traditional accounting regarding the impact of companies on the environment and society is not reliable (Schaltegger and Burritt, 2010). The implementation issues of sustainability accounting can be revealed from an innovation management perspective by researching the role of involved individuals (Schaltegger and Burritt, 2010; Schaltegger and Zvezdov, 2015). Other researchers sustain that there is no connection between accounting and sustainability (Caliskan, 2014). In its vision professional accountants in sustainability establish connections between non-financial reporting, financial value and sustainability value and assist in sustainability operations. As sustainability is a multidisciplinary field, accounting professionals are the ones who inform and educate parties related to their role in the company's processes. Last but not least, the accountants develop innovative ideas for better sustainability practices and structure new arrangements.

The aim of this paper is to analyze the papers from the environmental accounting area for the period 2006-2019 and provide new challenges for research. The papers analyzed are selected from the Clarivate Analytics and Scopus platforms. As this study will be a continuation of Eugenio, Lourenco and Morais (2010), who elaborated a literature review for the period 2000-2006, the selected period of papers analyzed begins one year after.

This paper represents a literature review of social and environmental accounting by focusing on: social and environmental accounting systems; social and environmental disclosures; regulation impact and relations among environmental disclosure and environmental performance. The authors suggest as conclusions the reflection of what companies are doing and the need to be close to their needs. Moreover, by producing more studies it will be given alternatives for developing the social and environmental accounting area. Consequently, the paper proposes the following directions in order to meet these alternatives. The paper started in this part with a brief introduction into the subject. In section 2, are discussed the contributions of the accounting profession to sustainability initiatives and environmental reporting from both a constructive and critical perspective and discussed new ideas for future research. In section 3 is highlighted the connection between environmental reporting, stakeholders and accountability and what are the future trends. Section 4 discusses

the impact of environmental reporting over stakeholders' decisions. At the end of each chapter it will be made a conclusion of the analysis and drawn future research perspectives. Even though, usually were analysed together the social accounting and environmental accounting, in this paper will be analysed only the environmental accounting discipline. The articles selected are from the most important accounting journals provided by Clarivate Analytics and Scopus.

### **Contributions of accounting profession to sustainability initiatives**

Several opinions appeared during time regarding the contribution of accountants to sustainability initiatives. Different studies showed both constructive and critical approaches towards the implication of the accounting profession in sustainability initiatives.

From a critical perspective, there are three main lines of not involving accountants in sustainability (Egan and Tweedie 2018). First, the requirements of sustainability accounting are for accountants a lack of technical or organizational capacities. A study conducted by Adams (2002) revealed that accountants just "collect numbers" and might be too technical for accountants to measure sustainability. Accountants might emphasize quantified, monetary measurement, to the detriment of physical measures, which are more used to efficiency and related investigations (Schaltegger et al. 2015).

A second line of critique argues that the requirements of sustainability initiatives are seen as a deficiency for accountants (Egan and Tweedie, 2018). One of the arguments is the uncooperativeness of accountants (Monteiro and Aibar-Guzman, 2010), focused on cost control and profit maximization. Moreover, accountants are considered to avoid complexities of sustainability initiatives in order to protect their reputation (Bebbington and Larrinaga-Gonzalez, 2014). Then, the study conducted by Adams (2002) revealed that the implication of accountants in novel practices could "ruin our credibility".

The last line of criticism refers to the preservation of power or organizational domain of accountants, for which they might be motivated (Egan and Tweedie, 2018). The work that is perceived by accountants as "dirty work", might be delegated by them in order to realign "client images with professional realities, or shift client evaluations of their profession" (Vough et al., 2013). In other studies, accountants are perceived as "inert, unable to learn" (Khan and Gray, 2016) or resistant to initiatives that "undermine the existing power of accountant-generated accounting" (Larrinaga-Gonzalez and Bebbington, 2001). Last but not least, accountants might be perceived as unable or unwilling to change by the management, who might not want to engage with them (Vough et al., 2013).

From a constructive perspective, accountants can contribute to organizational sustainability agendas, in some cases adding that either the profession or organizations must change to realize this potential (Egan and Tweedie, 2018). The first constructive line comes from the professional side. Accountants are willing to participate in sustainability initiatives because they now consider sustainability important to long-term risk management and survival (Egan and Tweedie, 2018). The growing demand for sustainability skills is beginning to shift professional practice, with the accounting profession becoming "more strategic with signs of increasingly deliberate and careful positioning of accountancy skills and techniques as relevant" (Lovell and MacKenzie, 2011).

The second constructive line comes from concrete contributions accountants are willing to make to organizational sustainability (Egan and Tweedie, 2018). Accountants are considered to have the possibility to make financially focused sustainability metrics more reliable and accurate, and thereby raise the profile of such initiatives (Wilmschurst and Frost, 2001). Then, accountants are considered a connection between management and the board, and so they can "act as facilitators for upper level management in sustainable development" (Mistry, Sharma and Low, 2014). Last but not least, where sustainability initiatives engage broad management

teams, there is an increased chance for organizations to achieve synergies and cost-efficiencies from integrating disparate reporting systems (De Villiers, Rouse and Kerr, 2016).

The last constructive line considers that there is more engagement of accountants (Egan and Tweedie, 2018). In order to achieve this engagement, there is a need to have a closer connection between accounting practitioners and academics. Moreover, accountants can develop targets, "green" strategies, process design, recycling, waste reduction and capital investment models (Egan and Tweedie, 2018). Many studies focus on changing accountants' skills or dispositions, and conclude that accountants need sustainability training (Williams, 2015; Schaltegger and Zvezdov, 2015). Another important aspect is the fact that sustainability managers may be unaware of "the decision-making information potentially offered by environmental accounting systems" and so should enroll accountants to "render transparent the formerly invisible" (Parker, 2000).

Egan and Tweedie (2018) highlighted in their study that accountants adapted well to early changes aligned to cost-efficiency, they struggled to engage with more creative sustainability improvements. The authors also sustain that accountants made deliberate, strategic decisions to engage or not engage based on the capitals they had available. As a structure that shapes behaviour, accountants' professional habitus can also impair effective engagement. That habitus might discourage accountants from going beyond "collecting numbers", and cultivate a mind-set such that "good" sustainability accountants are difficult to find.

After constructive and critical perspectives of the implication of the accounting profession to sustainability initiatives, there are different opinions in literature on how the involvement of accountants should be. There are suggestions in literature about processes and mechanisms for a better engagement of accountants. There is also a highlight on appropriate training, but little analysis to facilitate the engagement from organizational and management practices (Egan and Tweedie 2018).

Caliskan (2014) applied a literature survey and find that there is no relationship between sustainability concept and accounting. In its vision professional accountants in sustainability establish connections between non-financial reporting, financial value and sustainability value and assist in sustainability operations. As sustainability is a multidisciplinary field, accounting professionals are the ones who inform and educate parties related to their role in the company's processes. Last but not least, the accountants develop innovative ideas for better sustainability practices and structure new arrangements.

Schaltegger and Zvezdov (2015) find that accountants are only partially involved in sustainability accounting. They act as gatekeepers between sustainability managers and higher management. By this role, the authors suggest that they can influence the relevance of sustainability accounting regarding information collected, type of information the recipients gets or the way in which the information is generated. A strong point of the study is the fact that it was realized by companies from the UK and Germany with good sustainability rankings. A limitation of the study is related to the fact that some respondents occupy multiple positions inside one company (eg. Procurement manager or quality manager).

In conclusion, there are both constructive and critical opinions about the implication of the accounting profession in sustainability initiatives. It could be argued that accountants act as gatekeepers between sustainability managers and higher management (Schaltegger and Zvezdov, 2015). Also, in order to improve their knowledge related to sustainability performance and knowledge, accounting education will play an important role. In literature, different studies were related to the contribution of accountants to sustainability initiatives, but as Egan and Tweedie (2018) mentioned, there is still more to be researched on how to engage accountants in the processes and mechanisms of sustainability. Moreover, it could be a subject to emphasize how management practices can facilitate the engagement

process. Still, also non-accountants need to acknowledge how far can accountants advance in the sustainability discipline and play the sustainability role in the company.

Finally, further studies could investigate the role of the accounting profession to sustainability initiatives in areas not so explored: small and medium enterprises, mergers and acquisitions, taxation, state-owned enterprises.

### **Connections between environmental accounting, accountability and stakeholders**

Environmental accounting is considered a social responsibility of any business and having a transparent environmental information disclosure to stakeholders helps in the decision-making process (Sen, Pattanayak and Choubey, 2010). The development of accounting was considered more than an economic aspect and was encouraged by the emergence of social and environmental issues (Madein and Sholihin, 2015).

An interesting perspective is offered by (Bebbington, Russell and Thomson, 2017), where the authors describe their own vision and experience about social and environmental accounting. Bebbington considers that there is a “need to study social, environmental and economic phenomena and then to look for the accounting influence rather than start with the accounting and keep it at the centre of one’s focus”. Russell highlights “the importance of focusing on local issues whilst connecting to work across disciplinary, institutional, geographical and socio-political boundaries”. Last but not least, Thomson pointed out that “in relation to SEA there appear to be theoretical tensions and contractions between thinking about governance and accountability as being characterized by conflict; by rational, evidence-based debate; and through dialogic engagement”.

When accountability appeared, it raised practical concerns about democracy, governance and human-nature relations. By placing accounting in the accountability frame, there appears in literature the question “How better to distinguish between accounting and accountability?” (Bebbington J., Russell, S. and Thomson, 2017).

“Accountability” describes all techniques by which an organization gives an account of its activities to those people and groups (internal and external) that have a right to that information (Gray et al., 1997). The accountability information is comprised into calculative and narrative (Margerison, Fan and Birkin, 2019).

Others consider that accountability allows prediction of negative social and environmental effects (Caliskan, 2014). Therefore, their consequences are avoided or minimized. The function of this mechanism needs a restructure of accounting information systems in corporations to pursue these costs.

Other authors characterize accountability as offering insights into understanding the potential of accounting. This potential can be a transformative and emancipatory force rather than a word for partial disclosures designed to maintain self-interest of corporations’ governments and regulators (Gray, 2010; Bebbington et al., 2017).

The SEA practitioners and researchers made efforts to broaden accounting’s scope and make more accountable the organizations and business for their impact on natural environment and society (Gray, 2010). Researchers explored a wide range of environmental issues: biodiversity (Feger and Mermet, 2017), ecology (Russell, Milne and Dey, 2017), extinction prevention (Atkins and Maroun, 2018), pollution, water quality, deforestation, climate change, greenhouse gas emissions (GHG) (Olson, 2010; McNicholas and Windsor, 2011).

The ideas for future research could come by studying the interdisciplinary of environmental accounting and exploring its connections with other disciplines. Environmental accounting research by its information production and dissemination by economic entities will remain retained in the model of accounting (Russell, Milne and Dey, 2017). However, future research could examine narratives from photographs, sculpture or fiction and have collaboration

with environmental humanities and reach social-ecological change (Loftus, 2016). By this action, the accountant can go outside-of-the-box, understand and develop ecological sensitivity (Whiteman, 2010).

Moreover, future research can also reach engagement with stakeholders. By interdisciplinary, it could be designed and created different accounts and accountability practices and recognize contributions of different epistemic communities (Whatmore and Landstrom, 2011). Also, the enrichment of understanding of accounting in connection with markets, socio-ecological change and organizations could facilitate collaboration with scientists, arts and humanities and conceptualize accountability, accounting and accounts. Last but not least, accounting can go even more ecologically sustainable by exploring the connections of environmental accounting with nature writing or ecology.

### **Impact of environmental reporting over stakeholders' decision**

Environment has become an important business issue (De Villiers and Van Staden, 2012) and different studies in literature proved that investor behaviour is influenced by environmental issues (Van der Laan Smith et al., 2010). Practitioners consider it least beneficial for them in the decision-making process assessing the impact of environmental reporting practices on corporate performance (Sen, Pattanayak and Choubey, 2010).

The main actors involved in the decision-making process of stakeholders are the users of the environmental information. These users can be either internal (managers) or external (investors, auditors).

From shareholders' perspective, a significant percentage of them sustain to make compulsory and prescribed environmental reporting and not to leave to the discretion of companies (De Villiers and Van Staden, 2012). The information required by most of the stakeholders is related to environmental policy, measurable environmental targets, environmental risks and impacts.

From investors' perspective, a study conducted by (De Villiers and Van Staden, 2011) revealed that investors prefer to have disclosures from annual reports, websites or standalone reports.

For regulators, the active investors are principal actors in decision-making, as they rely on the information disclosed by companies to make investment decisions (De Villiers and Van Staden, 2012). Moreover, passive investors listen to the advice from institutional investors or analysts.

The credibility of the information supplied by a company needs to be assured by an environmental audit in order to reduce information asymmetry (O'Dwyer and Owen, 2005). By this audit, the environmental information disclosed gives more credibility to the users of the information and has the certainty that cannot be replied (Laufer, 2003). On the other hand, a study conducted by (De Villiers and Van Staden, 2012) highlighted that the users might be reluctant to do independent audits of environmental disclosures due to the conflict between cost and benefits of audits. Other papers do not seem to take into account these conflicts, as they consider more important the assurance of environmental and sustainability reports (O'Dwyer and Owen, 2005; Simnett, Vanstraelen and Chua, 2009; Kolk and Perego, 2010).

Alewine (2010) pointed out that the international bodies of accounting can improve the decision-making of stakeholders regarding environmental accounting information. For management, the decision-making can be improved by knowing how to disclose information where environmental accounting standards allow flexibility. For auditors, the decision-making can be improved by knowing how auditors can conduct different auditing tests on environmental accounting standards and its effectiveness. For investors, the decision-making can be improved by knowing how different environmental disclosures affect the processing of the information and the investment decision.

Madein and Sholihin (2015) demonstrated through its experiment a significant difference between groups who receive economic, social and environmental information and groups who receive only environmental information. The study also highlights how managers make decisions in cases involving multiple stakeholders. Limitations of the study are related to the disadvantages of qualitative information when compared and the fact that does not consider individual characteristics.

Burritt and Schaltegger (2010) argued that from a managerial perspective sustainability accounting offers solutions to problems and supports the decision-making of stakeholders and different types of managers.

As a conclusion, there is a need for further studies also in the decision-making process of stakeholders. These can be conducted by experiment, interviews, online surveys on either accounting practitioners or students as there is no difference in investment decision between them when provided with environmental information (Liyanarachchi and Milne, 2005; Madein and Sholihin, 2015).

## **Conclusions**

The SEA research still has ways to develop and propose new subjects for exploration. Different papers from literature treated either together or separately the social and environmental accounting. This paper discusses subjects only the environmental accounting discipline and tries to synthesize three directions for future research.

The first direction discussed the critical and constructive aspects of the implication of the accounting profession into sustainability initiatives. From a critical point of view, accountants are perceived as not having technical and organizational skills, not being cooperative and not being disposed to lose power as being the ones who do the “dirty job”. From a constructive point of view, accountants are willing to participate in the sustainability initiatives; they offer accurate and reliable sustainability metrics from a financial point of view. Still, in order to get involved in sustainability initiatives, they need to have an engagement. This engagement can be reached by creating the connection between practitioners and academic accountants. Further studies can analyse how this engagement can be reached. Other future research can be concentrated on the role of accountant in sustainability initiatives for small and medium enterprises, mergers and acquisitions, taxation, state-owned enterprises.

The second direction discussed environmental accounting, stakeholders, accountability and the connection between them. The environmental accounting is presented from its interdisciplinary perspective and the connections that have with biodiversity (Feger and Mermet, 2017), ecology (Russell, Milne and Dey, 2017), extinction prevention (Atkins and Maroun, 2018), pollution, water quality, deforestation, climate change, greenhouse gas emissions (GHG) (Olson, 2010; McNicholas and Windsor, 2011). As for future research, there are other connections that environmental accounting can create in order to contribute to more ecologically sustainable activities: nature writing or ecology or examining narratives from photographs, sculpture or fiction and having collaboration with environmental humanities and reaching social-ecological change.

The third direction discussed is the impact of environmental reporting over stakeholders’ decisions. The impact is discussed from different stakeholder perspectives: investor, shareholder and regulator. Another aspect discussed is the assurance of environmental information for the decision-making of stakeholders, which needs to be assured by an environmental audit. As future research, as is still to be more explored about decision-making of stakeholders, different interviews, online surveys or experiments can be done. An important aspect that can be included is the opinion of an auditor, in order to have assurance of environmental information.

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# ANALYSIS OF COVID-19 IMPACT IN AIRPORT MANAGEMENT. PROCESS AND OPERATIONS IN ROMANIAN AIRPORTS

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**Abstract:** *The COVID-19 pandemic had a significant impact on the airport industry due to the measures taken by all states, in order to prevent the spread of the virus. By its characteristics, an airport is a closed and crowded place where people from different cities and countries gather, making it a perfect environment for the virus to spread faster internally and internationally. Due to this fact, there was a need for countries to impose strict rules and procedures such as: closing borders, imposing limits to flight capacity, accepting flights between countries only for people that have a good justification, mandatory quarantine after a flight etc., which inevitably affected all airports processes, forcing airport management to quickly adapt and implement new functional procedures. The first objective of this paper is to analyze the changes in management and operations at the airport level and how Romanian airports handled the initial impact of COVID-19. The second objective is to identify the different management approaches needed during the pandemic. The third objective is to identify what were the recovery actions and what measures are needed during this crisis. The findings of this paper will help to better understand the initial impact of COVID-19 on the Romanian airport industry and serve as a valuable resource, by showing the most optimal management approaches.*

**Keywords:** airport, management, operations, COVID-19.

## Introduction

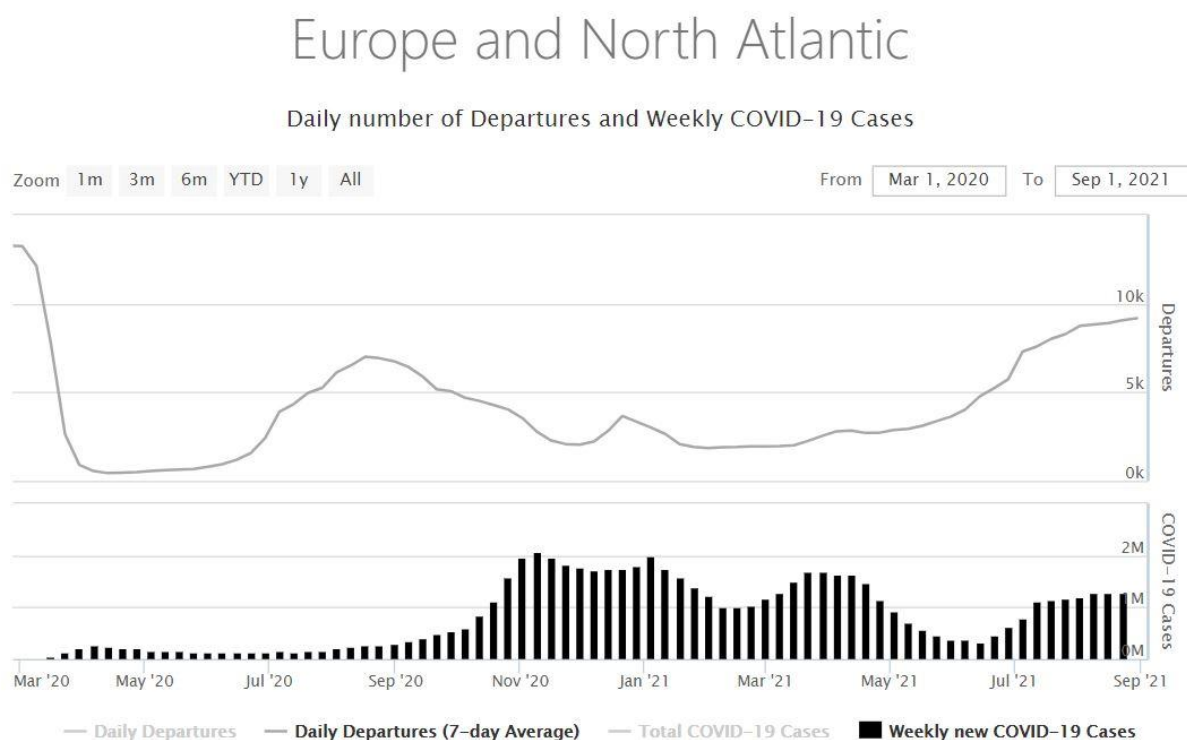
Air travel has significant advantages in its ability to provide fast, reliable and unobstructed services to passengers, which is why it cannot be matched by any other means of transport. (Dormas, 2014). Airports are an integrated part of air travel, providing safety and security while fulfilling their purpose, to provide key infrastructure to airlines, to safely transport passengers and goods (Conti, Ferrara, & Ferraresi, 2019) (Huang, Xiaoa, & Wang, 2018).

Airports are an ensemble of all lands, buildings, constructions and installations necessary for aircrafts to land and take-off, being one of the largest and technologically advanced structures ever built (Chiti, Fantacci, & Rizzo, 2018). They are institutions of great social and economic importance, expanding tourism and contributing to the development of business in their region (Remencová & Sedláčková, 2021).

According to the International Air Transport Association (IATA) the air transport industry is providing 25 million jobs worldwide. Since the beginning of the pandemic, to an extent, all these jobs have been put at risk (Serrano & Kazda, 2020), airlines and airports being forced to work with minimum personnel in order to cut off costs.

Covid-19 was first observed in December 2019 in Wuhan, China and according to medical research, the virus proved to be highly contagious, transmitted between individuals by air, via respiratory droplets (Rasca, Markvica, & Ivanschitz, 2021). By March 11th, 2020, the World Health Organization (WHO) declared COVID-19 as a pandemic, this virus significantly affecting our health and almost all global economies. Because of its economic effects, with millions of people losing their jobs and falling into extreme poverty, the pandemic is estimated to have caused the largest global recession since the Great Depression in the 1930s (Sun, Wandelt, Zheng, & Zhang, 2021).

Airports and airlines were globally affected in all ways, registering in a matter of months significant loss in passenger and cargo transportation, flight demand, travel restriction between countries, issues with personnel availability and revenue loss, with the apparition of the Severe Acute Respiratory Syndrome, later known as Covid-19. *“The Covid-19 pandemic has erased more than 20 years of passenger growth, almost overnight.”* (ACI - Airport Council International, 2021). The immediate impact of the pandemic in the aviation sector can be seen in Fig. 1., number of departures dropping at the beginning of the pandemic and continuing to fluctuate as the virus spreads. Improvements in the number of flights can be seen after the distribution of the Covid vaccine and some restriction lifts in most countries, but considering that most airplanes do not operate at full capacity, the increased percentage of flights is not equal to an increase of passengers.



**Fig. 1. Europe and North Atlantic. Daily number of departures and weekly covid-19 cases**  
**Source: (ICAO, 2021)**

The Coronavirus pandemic is also believed to be the biggest global shock since World War II (Hossain, Chakma, Tasnim, & Zahra, 2021). The war resulted in 5.5 million deaths, while Covid-19 has spread and infected by August 2021 over 219 million persons and resulted in the death of over 4.5 million worldwide (Worldometer, 2021) .

Throughout the year 2020 after the apparition of Covid-19, the perception and role of the airport in our economy and social life suffered significant changes. The ability of mass transport, to move large numbers of people, is now perceived as a liability due to the risks of exposure to the virus (ITF/OECD, 2020). As a result, many countries reduced air transport associated with pandemic centers and imposed restrictions to flights from other regions. These actions led to a sharp decrease in the number of domestic and international passenger flights (Zhang, Zhang, & Wang, 2020).

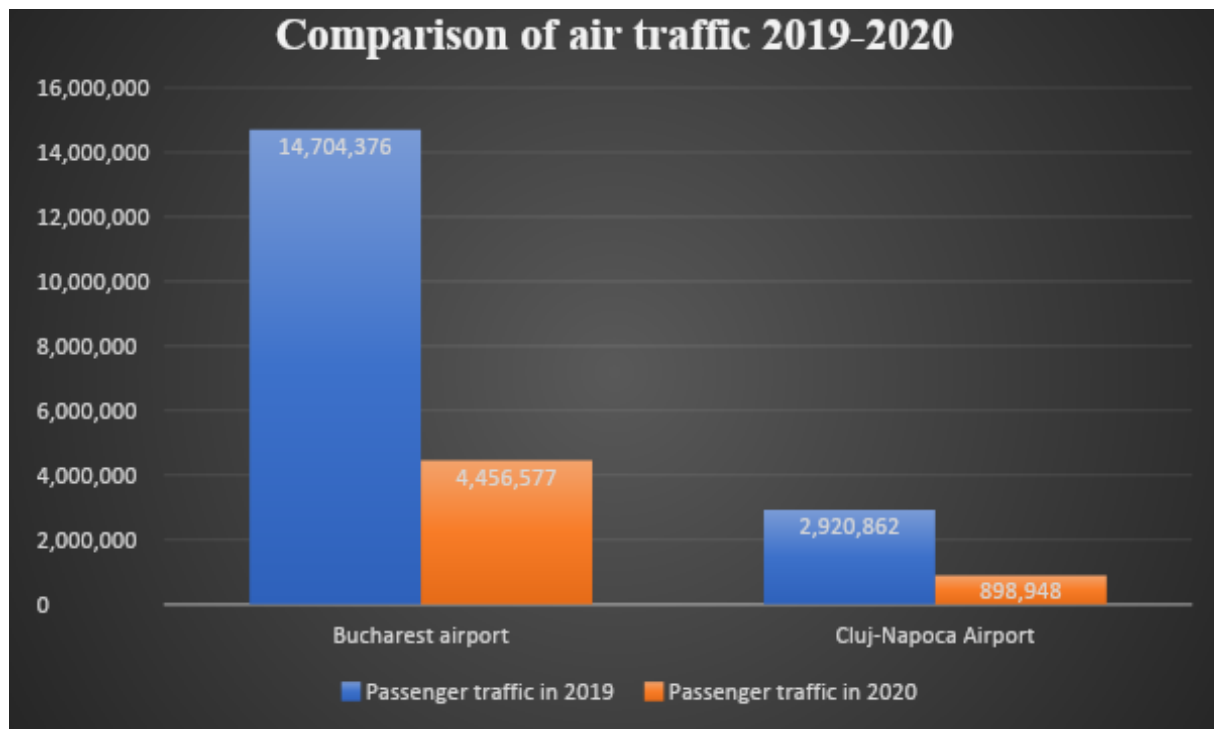
According to ACI World (Airport Council International) Fig. 2., although all airports and regions suffered significant losses in passengers due to the pandemic, the most affected region is Europe and will be the last to fully recover, because of its high dependence on international travel and connectivity.

Effects of Covid-19 on airport for 2020	Projections for 2021
<ul style="list-style-type: none"> <li>• In 2020, the COVID-19 crisis removed more than 5.9 billion passengers for the whole year 2020 compared to the projected baseline (pre-COVID-19 forecast for 2020), representing a decline of 62.3% of global passenger traffic;</li> <li>• The airport industry was expected to generate close to \$200 billion (figures in US dollars) in 2020 prior to the COVID-19 outbreak. The impact of the COVID-19 crisis on airport revenues was unprecedented, reducing revenues by more than \$129 billion in 2020 compared to the projected baseline;</li> <li>• Europe is the only region posting a decline above 70% of passenger's loss, compared to the projected baseline;</li> <li>• Since the "Great Lockdown" of April 2020, international passenger traffic remained virtually non-existent for the remaining of 2020. International passenger volume ended the year slightly below 1 billion passengers, a decrease of more than 73.7% compared to 2019 volume;</li> <li>• Global domestic traffic volume for 2020 reached only 2.6 billion passengers, a decline of 51.8% compared to 2019 volume.</li> </ul>	<ul style="list-style-type: none"> <li>• The lasting adverse impact of the COVID-19 crisis is forecasted to remove an additional 5 billion passengers by year end 2021 compared to the projected baseline (pre-COVID-19 forecast for 2021), representing a decline of 50.9% of global passenger traffic;</li> <li>• It is estimated that globally, airports will suffer the loss of more than \$108 billion of revenues by year end of 2021 cutting more than half of airport revenue expectations (-54.6%) compared to the projected baseline;</li> <li>• Europe is forecasted to remain the most impacted region with a decline of 66.0% compared to the projected baseline due to its high dependence on international travel and connectivity which are recovering at a slower pace than domestic travel;</li> <li>• International passenger traffic volume is expected to significantly lag domestic traffic recovery in 2021 and is forecasted to end the year slightly above 1.5 billion passenger or 40.6% of 2019 level;</li> <li>• Globally, domestic traffic will continue to increase in 2021 to reach close to 3.3 billion passengers by the end of 2021 corresponding to 61.4% of the 2019 level.</li> </ul>

**Fig. 2. Source: ACI - Airport Council International, 2021**

The Covid-19 pandemic caused a loss in air traffic by 69% for the major airports in Romania, even though the difference in passengers between them was over 11 million for the year 2019. This is also in accordance with the ACI (Airport Council International, 2021) publication that the impact in Europe is about 70% in air traffic loss.

Passenger traffic loss for Romania is consistent with the average of 70% presented by ACI for Europe. We can see in Fig. 3. that for the 2 major airports in Romania, Cluj-Napoca Avram Iancu International Airport and Bucharest Henri Coanda International Airport, located in the two largest cities, even though the difference in passengers per year, before the pandemic it was over 11 millions, the impact in the year 2020 compared with 2019, is of 69% loss for both.



**Fig. 3. Comparison of air traffic 2019-2020**  
*Source: (Bucharest Airports, 2021) ; (AIAIC, 2021)*

### **Airport Management during Covid-19**

After the pandemic outbreak, there was a shift change in every aspect of the airline industry, from airport management, processes and procedures, passenger expectation and demand, flight availability to reason for travelling. Because transport networks are such a critical part in the way we live, work and do business, the major impact on them are greatly affecting our lives and make the economy recover much harder (Rothengatterf, et al., 2021). These changes need to be understood by the authorities and airport managers so that appropriate processes could be implemented.

The study of (Bezerra & Gomes , 2020) underlines the necessity for managers to focus on improving the airport's attractiveness by orienting on passenger satisfaction. If in the years prior the pandemic, as (Gillen, Jacquillat, & Odoni, 2016) show, the biggest problems the airports were facing was an unsustainable growth in air traffic, leading to airports overcrowding and flights delay, where passenger satisfaction was mostly concerning improving these aspects, nowadays, passenger satisfaction mostly revolves in providing a safe and secure flight.

Measures to limit the pandemic spread within airports have a great impact in modification of operational procedures and infrastructure at the airport (Halpern, Mwesiumo, Budd, Suau-Sanchez, & Bråthen, 2021). Airports must ensure the health of passengers and employees and airport infrastructure from declining revenues as the transportation is slowing worldwide (Serrano & Kazda, 2020).

### **Protection measures adopted by Romanian Airports**

At first, in order to try and reduce spreading of the virus, most countries in Europe, tried to impose measures in order to decrease social contact in everyday life, for example: remote work and education, partially closing the borders, restrictioning free movement in the country etc. (Rasca, Markvica, & Ivanschitz, 2021). Romania also imposed in an early stage of the pandemic spread national lockdown from 16 March 2020 to 15 May 2020, in order to preemptive prevent the spread of the virus. These measures affected the transport networks and significantly reduced air traffic.

The prevention measures taken by authorities and implemented in all Romanian airports were gradually, but with a great impact in air traffic recovery, making airport operations much harder. Protection equipment, wearing face masks, implementing barriers to reduce physical contact and performing disinfecting procedures after high risk flights were among the first measures taken for airport personnel. These measures were combined with implementing restrictions for passengers as social distancing, requiring face masks while in the airport, limited access in the terminal, using hand sanitizer, monitoring temperature and even presenting a negative Covid test before being allowed to fly.

### **Changes in Airport Management, Operations and Processes**

The following section discusses the impact on passengers and airport management, including measures used to sustain the airport activity and implement recovery measures.

In the first phase of the pandemic, between March and Mai 2020, Romania was in lockdown, movement restrictions were implemented and most of the borders were closed or restricted with limited access in and out (UBB Cluj, 2021). At first, airports had an advantage to better respond, due to contingency procedures and disaster action plans that are made mandatory by European and National law. Even though pandemic contingency measures were probably not foreseen by airports in their own emergency plans, all airports have procedures with alternate ways to function in case of emergency, when the normal process is restrained by a disaster. As explained by (Serrano & Kazda, 2020), a succession plan for critical staff is a live document constantly being reviewed, that prepares staff to take responsibility from each other in case of emergency.

From the personnel point of view, the situation was also managed at first, when there were few cases and the virus was not widely spread, airports being prepared to replace all critical personnel involved in vital aviation activities.

After the first phase of the virus in Romania, the first 2 months have passed and even though strict measures were implemented, because of its characteristics, the virus continued to spread more and more in all regions. Authorities started to reduce some of the measures initially enforced and shifted from an emergency state to a state of alert. But because new information appeared every day about the nature of the virus, its spread and the death rate, more safety and social distance measures were enforced, and because of their characteristics, airports were mostly affected by these measures.

Even though airports managed to adapt quickly to the new changes and regulations, some being similar to their own contingency plans, for the airport, these were never made to be sustainable for a long period of time, while your own personnel is getting constantly sick and affected by the pandemic, the revenue is dropping from a lack of passengers and the costs for maintaining prevention measures are getting higher. Airport management was also obliged to resort in implementing new operational procedures, human resource management and adapt to new customer needs.

Due to budget constraints and a lower operational throughput, work from home was implemented in Romania and in airports also, in the fields where this was possible. Furthermore, technical unemployment was made available by the government, for all companies that are affected by the pandemic. This action created an incertitudine at the airport level, people's income was reduced considerably, in an institution that was considered one of the most secure lines of work, with constant economic growth. Serrano and Kazda (2020) presents this process as operation in a „*skeleton mode*”, where the airport has gone to a very small number of operations with reduced staff, so if one employee gets sick, he or she can be replaced by a standby team member.

Operation management was also an important factor in facing the new problems and developing public health procedures. Romanian airports have restricted access in the terminal



only to the passengers, people who escorted them were allowed only to enter the airport parking, this measure was enforced for arrivals and departures as well. Flights were spread in order to avoid congestion, also entering the terminal was done after a temperature check and use of disinfectant. The check-in space was wider now for all carriers, in order to maintain a 1.5 m social distance.

Passenger expectation has also inevitably shifted during the pandemic, this having a great impact on society. The airport is no longer seen by passengers as a means to go to a new exciting place, go on vacation or travel for pleasure/visiting a relative, it has shifted to a must use base, decreasing the number of travelers (Bielecki, et al., 2021). After the Covid-19 pandemic started, most of the passengers that used the airport were on a business trip or on an absolutely necessary one.

This phenomenon also changed the passengers' needs, from having an emphasis on fast service while providing a relaxing experience, nowadays passengers expect from an airport to be a safe and clean environment, with strict procedures that give them a feeling of safety while facing the pandemic. Improving standards and maintaining service quality for passengers was a challenge to managers even before the pandemic (Halpern, Mwesiumo, Budd, Suau-Sanchez, & Bråthen, 2021), when airports were operating under an economic growth and stability.

Based on the shift in passenger needs, Romanian airports implemented facilities to address the passenger needs, by introducing testing and vaccination centers in the airport and constant disinfection. In addition, the Romanian Government implemented a project with k-9 units, sniffer dogs, specialized in detecting the Covid-19 virus at passengers, described also by (Bielecki, et al., 2021) to be a solution in controlling the pandemic. This project was tested in Sibiu, Cluj-Napoca and Bucharest airport and it was declared a success, planning to reach all Romanian airports. The new measures implemented on airports in order to provide safety in face of the pandemic and also satisfy passenger needs will create a constant pressure to managers, now needing to operate with fewer passengers and lower income (Halpern, Mwesiumo, Budd, Suau-Sanchez, & Bråthen, 2021).

A much clearer view of how Covid-19 impacted Romania can be seen from the Babes-Bolyai University in Fig. 4., presenting up to date infections and deaths caused by the pandemic, but also its impact in our society since it appeared, depreciation of the national currency, unemployment and the economic boost related with the appearance of the vaccine.



Fig. 4. Source: (UBB Cluj, 2021)

## Conclusions

The COVID-19 pandemic and the related containment measures introduced by the Romanian government had a great impact in the aviation industry. All the passenger growth, infrastructure

investments, revenue and increased workforce have been shattered from last year. Airports, airlines, passengers and managers had to quickly adapt to a new normal, in order to ensure their safety and the safety of others, by not contributing to the spread of the virus. Management of airports has suffered a great deal of change, where finding ways to improve public health and safety and passengers safe transportation are much more valuable than reducing overcrowding or ensuring new non-aviation activities in the airport such as shopping centers or other facilities. Investments in expanding the airport and improving the infrastructure will suffer in the future, even after the economy will start to slowly recover, affecting the business model of air traffic (Avanzi & Zerjav, 2020).

A constant direction for airports will always be to facilitate technical innovation, create safer, faster and more efficient operations, while prioritizing security and safety (Remencová & Sedláčková, 2021). Researchers found that digitalization and intelligent technology plays another key aspect in coping with the effects of the pandemic, by reducing as much as possible the personnel presence in airports and making operations run faster (Hao, Xiao, & Chon, 2020). Analyzing how the Covid-19 pandemic affected the digitized and non-digitized airports while also observing if the usage of intelligent technologies influenced the recovery process can be a direction for future research. According to the findings of (Halpern, Mwesiumo, Budd, Suau-Sanchez, & Bråthen, 2021), a large proportion of passengers seem to want more control over their journey, by using „modern airports" (Malygin, Borodina, & Komashinsky, 2020) with automated technology as part of their travel experience.

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## Section 2

### EDUCATION, INCLUSIVENESS & LEARNING

#### THE IMPLEMENTATION OF THE ETWINNING PROJECTS, AN EFFECTIVE STRATEGY TO IMPROVE THE SCHOOL AND FAMILY PARTNERSHIP

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**Abstract:** *ETwinning projects are considered essential instruments through which teachers can collaborate, to make pupils' learning experiences more valuable and to provide them with the most varied and high-quality educational opportunities possible. Through this study, we aimed to identify potential topics of eTwinning projects that support the active involvement of the family in children's education and the process of strengthening the school-family partnership. Thus, the eTwinning platform was consulted to create an inventory of the titles of some eTwinning projects and to list some ideas of activities that can be organized in the school or the family environment, to strengthen the emotional relationship between children and parents, and at the same time to increase the quality of the collaboration between parents and teachers, to ensure a high-quality education for pupils. We have discovered that teachers from Europe have used the eTwinning platform to consolidate the school-family partnership. The projects were based on various activities. Most of them were organized at school, while others were organized at home or in other educational contexts. The most frequently organized activities were the workshops for parents and pupils. Usually, these types of activities have huge benefits and are considered a favorable context for positive interactions between parents, teachers, and pupils. Analyzing the images and photos posted on TwinSpace we consider that eTwinning projects could be initiated with success to obtain an authentic and functional partnership between parents and teachers. The paper is dedicated to primary school teachers and teachers who work at the preschool level, which are interested in initiating new eTwinning projects. The inventory of the activities could be used as a relevant source of inspiration in creating innovative strategies for strengthening the school-family partnership.*

**Keywords:** eTwinning Projects, cooperation, School-Family Partnership, intercultural learning, digital competencies

#### Introduction

Through eTwinning projects, teachers in Europe collaborate and share examples of good practices to achieve pre-set educational goals. Two founding members are needed to start an eTwinning project. Through the simultaneous participation of pupils and teachers from several countries, eTwinning projects have a high degree of relevance for pupils, being considered

attractive. High-quality collaboration is essential in the process of starting and implementing an eTwinning project. By participating in eTwinning projects, schools will become more visible in the local community, and at the same time in the European community. To be qualitative, eTwinning projects must meet several conditions, among which we mention systematic and effective collaboration between partner schools. The multidisciplinary approach of the proposed contents and the realization of connections with real life. is also considered very important. Thus, the projects implemented through this platform can be the basis for new collaborations within authentic and functional inter-institutional partnerships. A successful eTwinning project is based on the judicious use of technology. Digital resources are being used both to optimize communication between partners and to build valuable educational resources. Partners are encouraged to pay particular attention to evaluating the effectiveness of the project and disseminating their activities. Thus, at the base of high-quality projects, there must be motivation, passion, collaboration, mutual support, and continuous cooperation.

### **Literature review**

ETwinning projects facilitate a constructive and authentic collaboration between international partners, with positive influence over pupils' learning processes. ETwinning projects offer pupils various educational opportunities and support intercultural learning (Bozdağ, 2018). Digital technological resources are used to facilitate collaboration between partner teachers. Communication and interactions between teachers are taking place using various online applications (Bozdağ, 2018). The benefits of using the eTwinning platform are related to developing English language communication skills of participants involved in these projects, increasing their motivation to learn, developing pupils' digital skills, improving collaborative skills, and developing critical and creative thinking (Demir, & Kayaoğlu, 2021; Paz-Albo Prieto & Hervás Escobar, 2017). Research on the implications of eTwinning projects on pupils' learning processes and the didactic activity of teachers needs to be continued (Demir, & Kayaoğlu, 2021). According to Crişan & Albulescu (2018, p. 18), eTwinning projects can be considered “an excellent environment for practicing modern strategies, for learning by cooperation, for an exchange of visions related to the teaching activities”. The eTwinning portal is used by teachers to create and work on educational projects, facilitate their professional development, to communicate and share examples of good practices with other teachers from Europe through online courses (Crişan, 2013). In general, Telecollaborative projects in various fields are carried out on the eTwinning platform. They are addressed to pupils and preschoolers and facilitate systematic and continuous collaboration between partner schools (Gajek, 2017). Specialized studies have revealed the importance of building an authentic school-family partnership, based on trust, effective communication, and mutual respect, in which teachers and parents should work together as equal partners (Tett, 2004; Swick, 2003). A high-quality involvement of the family in the education of children has positive effects on their school results (Griffin, & Galassi, 2010; Moore-Thomas, & Day-Vines, 2010).

### **Methodology**

Through this study, we aimed to answer the following research questions:

1. What are the topics of some of the eTwinning projects that encourage the active involvement of parents in their children's education?
2. What were the main activities carried out within the projects?

We have used the eTwinning platform to identify some titles of the projects that were carried out to encourage the active involvement of parents in children's education and to facilitate the creation of a favorable family climate. Thus, the eTwinning projects which encourage the active involvement of the family in children's education were searched on the platform, using the word "parents" as keyword. The search on the Project section helped us to identify 2968 projects on

the eTwinning platform. The search took place on February 13, 2021. We have identified titles of projects that can be customized and initiated to develop parenting skills and strengthen the school-family partnership.

**Table 1. Examples of the projects, which encourage the active participation of the family in children's education.**

The projects' topics	Title of the projects
Projects organized to celebrate special events in the life of the family (organized on March 8th, May 15th, or June 1st). This eTwinning projects are dedicated to mothers, families or children	Mother Happy Mothers' Day My Mother at School Family Day Mum Power for Special Ones Mother Happy Mother's Day Family Day My Mom Me and My Mom To All Mothers Mother's Day and Legend of Martis Child Smile Mother's Day in Our School Mum, I Love You!" Mom, You Are My Spring! Let's Celebrate Mother's and Fathers' Day Together! Picture for Mom
Projects that encourage parent-child reading	I reading with my parents
Projects that encourage the involvement of fathers in the education of children	I learn with my father I read with my mom and dad together My whole world. My father.
Projects that encourage grandparents' involvement in children's education	Traveling to the childhood of my grandparents Games of our grandparents My cool grandparents Grandpa and grandma's games Toy story: revisiting our grandparents and parents' playground Writing and Sharing the stories of our (Grand)Parents They were also children „Grandpa, How Was Life Back Then?“ (Hi)stories from the Cold War Granny's typical recipes Forgotten children games Grandparents tell us Family's Party Grandparent's experience in love: grandchildren Our parents' and Grandparents' Toys Collecting Memories of the Past Collecting, writing down, keeping and sharing our grandparent's stories
Projects that encourage the involvement of the whole family in	Learning with my family The Quality Time with My Parents

the education of children and the creation of a favorable family climate	<hr/> My parents are the best Painting with kids and parents The book of my family A „day” for the family, between desire and reality Cooking with my mom What can students teach their parents? Time to hug mum and dad! Happy kids – happy parents Family time Memories in a box Dad and Mom play with us The family and I A day for the family Me and my family My large family Quality time with parents Learning with my family Well-educated children and fun games Family’s time My secret treasure: FAMILY Family is Everything: No Dirty Language I love my parents Family activities at weekend I’m proud of my family Family ties One Day for the Family Happy House My Dear Parents Family Stories – Our Stories Culinary treasures My family One child is one flower. Never let it wilt Happy families and their effect on education Ciencia para toda la familia (Family Science) My Family and I are Playing Brain Games My Parents are My Masters Funny Evening Activities with My Family In The Pandemic Daily Life Skills at Home in the Pandemic Process My values are in my memory of my family My family My parents are the best My Parents Are My Masters Family’s Puppet Show My Puppet Has Something to Tell A Day for Us Family Touch My Life&Soul
Projects that encourage family involvement in school life	<hr/> Parents and Disciplines in different cultures What does it mean - to be a good parent? My parent’s profession Traditions bag My school is my home <hr/>

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Together against bullying  
 Teacher for a day  
 Journey Together> Families, Schools, and Communities  
 Together with one goal  
 Opportunities within our generations  
 How is my school and how I want my school must be  
 Families and school  
 This is how we share  
 Teachers' high-quality feedback to parents – key to a  
 successful child's development  
 The Family in the School  
 Let's read books and have fun with both students and  
 families  
 Family traditions  
 Happy days with friends and parents  
 Being a parent today... is not a secret anymore?  
 School and Parents- Partnership for Sustainable Education  
 Painting with kids: Art and design  
 Teacher and Parents – Together for the Benefit of Children  
 Parents and teachers – Partners in education  
 Families: same problems, different solutions  
 Le partenariat famille et école- un moteur clé de l'éducation  
 School and family for a quality education  
 Getting parents involved in school  
 Teacher is my parent  
 Childhood in color  
 Share my heart with my parents  
 My parent's job  
 Together with our parents, build bridges... pull down  
 barriers  
 School and family  
 Collaboration and Learning  
 Together we can do more, together we can do better  
 My School is at Home  
 I play with my mom at school

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Teachers from Romania have also participated in some of the projects presented in the table above, as founding members or partners. Most of the projects identified by us had as the main objective the consolidation of the parent-child emotional relationship, respectively the increase of the degree of involvement of the family in the school life and the children's education. The main actions carried out by pupils in the projects are:

- Making gifts for family members;
- Creating a book about their own family;
- Collaboration with family members in carrying out school projects;
- Participation in workshops with their parents;
- Participating in games or recreational activities with parents;
- Reading activities, creating a story or a book;
- Planting or other greening actions;
- Cooking activities with family members;
- Letters addressed to family members;
- Taking photos with the loved ones, creating family portraits, or albums with the family pictures;

- Sharing memories, thoughts, feelings, traditions, and life experiences;
- Making toys and making puppet plays;
- Presentation of some information related to their parents' job;
- Celebrating special events with their family members (for example, Earth Hour);
- Collaborative projects made with the help of their parents;
- Creating the family tree, with the help of their parents;
- Participation in celebrations / shows;
- Carrying out visits or walking in nature,
- Assuming some of the parents' responsibilities.

Some projects were designed for the development of parenting skills, being organized meetings with psychologists and school counselors, or visits to pupils' homes. Also, in some of the activities, the parents should take some of the children's responsibilities and roles to understand them better.

### **Conclusions**

Participation in eTwinning projects has positive effects on strengthening the school-family partnership. Teachers from various countries have founded or have participated in international eTwinning projects, to increase the involvement of the family in children's education. Some projects were aimed to facilitate the active involvement of fathers in the education of children, starting from the results of recent studies that have revealed that mothers are more involved than fathers in aspects related to the education of children. Other projects are based on the active involvement of grandparents in school life, understanding the benefits of intergenerational learning. It is recommended to celebrate important events which take place in the life of the family and to carry out teaching activities based on intergenerational learning. Non-governmental associations can support projects for the benefit of pupils and their families. To organize efficiently all the educational workshops for parents and pupils and other activities realized in collaboration with pupils and parents, it is beneficial to request sponsorships from the business environment. In this way, the access of each parent and student to the workshops will be guaranteed. Through the eTwinning platform, teachers can share with their colleagues examples of good practices and exchange different views relating to the children's education. Based on the educational needs of students or parents, similar research can be carried out to identify effective activities proposed by teachers and carried out in eTwinning projects. These activities are validated by the educational practice and can be successfully included in the new eTwinning projects.

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# EXPLORING THE IMPLEMENTATION OF AN ONLINE EDUCATIONAL PLATFORM AMONG STUDENTS AND COMPANIES FROM ROMANIA

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**Abstract:** *In a digital age dominated by innovations and advanced technology, the implementation of online educational platforms which integrate the knowledge acquired by students with the companies' needs and requirements becomes essential. These platforms are meant to set an interface between the educational environment and companies. Thus researchers, teachers, and experts from universities, together with students, will get involved in the innovation, development, and automation processes proposed by the business environment. However, students can encounter difficulties in the process of their integration on the job market because of lack of experience. Also, most of the time, the companies have insufficient information regarding the results of the research activities conducted by students within universities. In order to find efficient solutions to these problems, this paper aims to identify the main expectations from students, teachers, and companies' regarding the usage of online educational platforms. The results highlighted that the main obstacle in maintaining the collaboration between the business and educational environment is the lack of permanent contact between companies and universities. At company level, results indicate that an online educational platform should provide solutions for 'daily activities' challenges and bring viable contributions to the technological development and digitalization of internal processes. The results of this study convey a proper basis for developing an online educational platform among students and companies in Romania, which will facilitate the collaboration between educational and business environments. The current research is built on the fundament of a questionnaire addressed to both representatives of the educational environment and the ones from the business environment.*

**Keywords:** innovation, online platform, educational environment, employability on the labor market, partnership

## **Introduction**

In the current context, where students should acquire skills, knowledge, and attitudes that facilitate their optimal integration into the workplace, it is necessary to have a close link between universities and business environment representatives. Results of research conducted at the university level are often not known by entrepreneurs, who could use them to optimize the products or services they offer.

We have established the characteristics of an online platform through which we aim to promote and sustain the activity research realized at university level. Thus, persons who activate in the academic environment (students, those enrolled in masters programmes, doctoral students, postdoctoral researchers, and teachers) will have the opportunity to share their results with a large number of companies or entrepreneurs. The platform developed by us could be used by representatives of the business environment in order to improve their services. "INtellect" platform has educational functions but could be also considered a business platform that generates connections between researchers and entrepreneurs from Romania, creating solid partnerships, and generating mutual support in solving problems faced by Romanian entrepreneurs or researchers. This platform supports innovation and research in Romanian higher education.

The benefits of enrolling on this platform are great, both for the representatives of the academic environment and for the representatives of the business environment. Research programs initiated by academia can be promoted so that as many researchers as possible participate in them. On the one hand, students will be aware of the requirements of employers, and will acquire the necessary skills to work on the labor market. On the other hand, companies will be aware of the discoveries registered in higher education, will be able to benefit from innovative ideas that they can capitalize in order to optimize their activity, and will be able to find potential employees or collaborators. This collaboration will generate jobs and will contribute to the realization of authentic partnerships.

Existing labor market requirements are constantly changing. Through the platform, we will be able to help students, doctoral students, or postdoctoral students who want to integrate on the labor market to find a job. Also, in the current epidemiological context, in which the emphasis is on digitalization, companies will be able to get in touch with professionals from academia, which could help them optimize their work.

## **Literature review/Theoretical framework**

Social networks play an important role in promoting the services offered by companies. The feedback provided by consumers is extremely important (Ramaswamy & Ozcan, 2018). "Over the last few years, the sharing economy has been changing the way that people share and conduct transactions in digital spaces. This research phenomenon has drawn scholars from a large number of disparate fields and disciplines into an emerging research area. Given the variety of perspectives represented, there is a great need to collect and connect what has been done, and to identify some common themes, which will serve as a basis for future discussions on the crucial roles played by digital platforms in the sharing economy" (Sutherland, & Jarrahi, 2018, p. 2). Using online platforms has multiple advantages. Their main role is to carry out intermediation between different agents (Sriram, Manchanda, Esteban-Bravo, & Chu, 2015). "Accordingly, platforms devote much attention to their business model, that is, to how they court each side while making money overall" (Rochet & Tirole, 2003, p. 990). "Despite the growing volume of research, there is still no consistent definition of what constitutes a platform or a platform business. The term continues to be used loosely and in different contexts " (Jia, Cusumano, & Chen, 2019, p. 2).

According to Parker et al. (2016), the main advantages of developing online platforms are related to low costs (for development, user acquisition, and user retention processes), wide

accessibility, and the possibility to obtain incomes from various sources. "An online matching platform is a marketplace that brings together users who search for, interact with, and establish personal (e.g., dating platforms such as e-Harmony and Match) or business (e.g., recruitment platforms such as Monster and CareerBuilder) relationships with each other" (Chen, Dai, Korpeoglu, Körpeoğlu, & Sahin, 2018, p. 436).

"Two-sided platform businesses serve distinct groups of customers (companies/other employers versus employees on short term contracts/workforce or available human resource, that) need each other in some way. They provide these customers with a real or virtual meeting place, and they facilitate the interactions between members of these customer groups. They essentially act as intermediaries between the two groups and create efficiencies by lowering transaction costs and reducing duplication costs" (Evans, D. S., & Schmalensee, R., 2008, p. 667).

An educational platform that can connect the business environment with the researchers from university does not exist in Romania. Through this kind of platform, teachers, researchers, and university experts, along with thousands of students, could be involved in the process of research, innovation, development, in order to improve the activities of the companies. The iNtellect platform is a business platform because it was constructed to generate profit, but it is also an educational platform because it provides its users with varied educational opportunities, including high-value results obtained in researches conducted in various fields.

## Methodology

Labor market evolutions influence employment requirements regarding the skills that employees should have so as to be able to perform in their duties. Thus, universities must actively participate in creating a close link between companies and the business environment. Our offer and the functionalities of the platform were elaborated starting from the results of a market study carried out in the online environment. Therefore, two questionnaires were designed (one addressed to the business environment and one for the representatives of the academic environment). The questionnaires were included in Appendix 1 and Appendix 2.

No less than 552 people answered the questionnaire applied to the educational environment (students, researchers, and teachers from the university system), and at the same time we have registered 154 respondents from the business environment (entrepreneurs, managers, administrators, team leaders, heads of departments, product owners, managers, human resources experts, other company specialists, etc.). Both questionnaires were submitted and completed during August 2020.

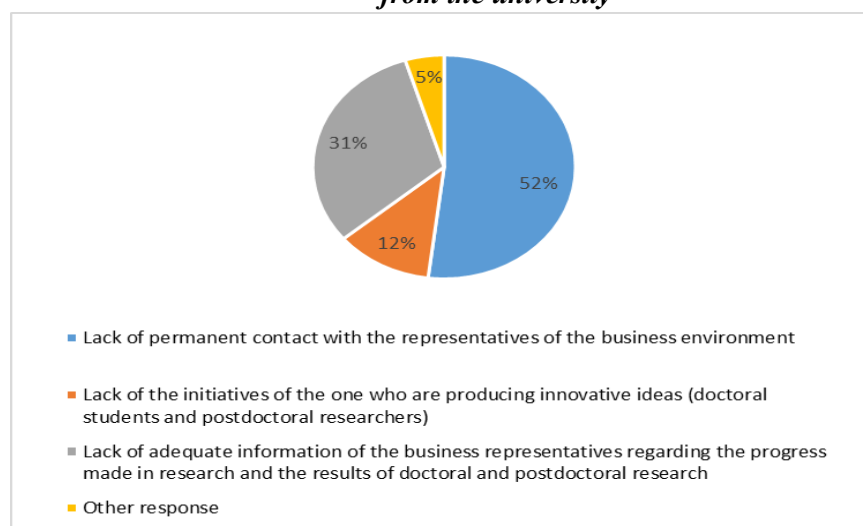
The purpose of designing the questionnaires was to see if the representatives of the academic environment consider appropriate the idea of a business in terms of creating an online platform, through which we aim to increase the efficiency of collaboration between people from the university system and business representatives. The questionnaires were sent online on through social media platforms (e-mails, Facebook, LinkedIn, WhatsApp etc).

**Table 1. Sample description; status of respondents**

<i>Business decision-makers</i>	<i>Relevant actors in the educational environment</i>
<ul style="list-style-type: none"> <li>● managers;</li> <li>● administrators;</li> <li>● team leaders;</li> <li>● heads of departments;</li> <li>● product owners;</li> <li>● managers, specialists in human resources</li> <li>● other specialists from companies</li> </ul>	<ul style="list-style-type: none"> <li>● students, master degree students;</li> <li>● researchers (doctoral and postdoctoral students);</li> <li>● professors from the universities</li> </ul>

More than half of the respondents from the academic environment (52%, that will be 287 of respondents in absolute value ) mentioned that the main obstacle in maintaining the connection with entrepreneurs is the lack of permanent contact with the business environment. 31% of the respondents (173 in absolute value ) consider the lack of initiative of the doctoral and of the postdoctoral students as an obstacle. 12% of the respondents (66 respondents) say that inadequate information of the business environment on the results of researches conducted at doctoral and postdoctoral level is an obstacle, and 5% of the respondents (26) mentioned other reasons such as lack of a legal framework of connectivity and communication between the 2 environments, lack of time, lack of partnerships, limited or inefficient resources, the weak quality of academic training, the lack of economic and educational policies to facilitate better collaboration (see Figure 1). The majority of respondents (95% ), respectively 522 people, do not know platforms that facilitate the connection between the academic and the educational environment.

**Figure 1. The main obstacles regarding the connection between entrepreneurs and the researchers from the university**



The majority of respondents (98% or 508 respondents) considered that a platform that provides opportunities for students and researchers in academia to obtain additional income by providing paid services based on short-term contracting would be useful. Also, in an overwhelming proportion (92% or 508 respondents) manifested a high interest in using an online platform through which to have direct, simple, and efficient contact with the business environment (SMEs, national and multinational companies) so that the expertise, research results, and innovative ideas to be implemented and thus obtain additional income.

Most of the business specialists who completed the questionnaire comes from companies headquartered in the NW Region (99 respondents), followed by those from the Bucharest-Ilfov Region (22 respondents), those from the Center Region (16 respondents ), from the West Region (10 respondents), the South-Muntenia Regions, and the South East Region with 3 respondents and one respondent from a company headquartered in the SouthWest Oltenia Region.

Most of those who participated in the market study (49 respondents) come from companies whose field of activity is Information and Communication Technology (ICT), followed by those who work in companies in the financial-banking field (32 respondents), 28 respondents working in companies in other fields such as tourism, legal services (2), real estate and furniture appraisals businesses (2), automotive, appraisal, recreational and entertainment activities, consulting ( 5), educational services (2), tourism (2), BPO / Shared Service Center,

creative industry - Radio (2), other business support services, insurance, other financial services (2), coaching and training related services, human resources consulting, aviation, insurance (1), 15 respondents from companies in the field of trade, and the rest of the respondents work in construction, manufacturing, health, research, transport, energy production (including electricity and gas).

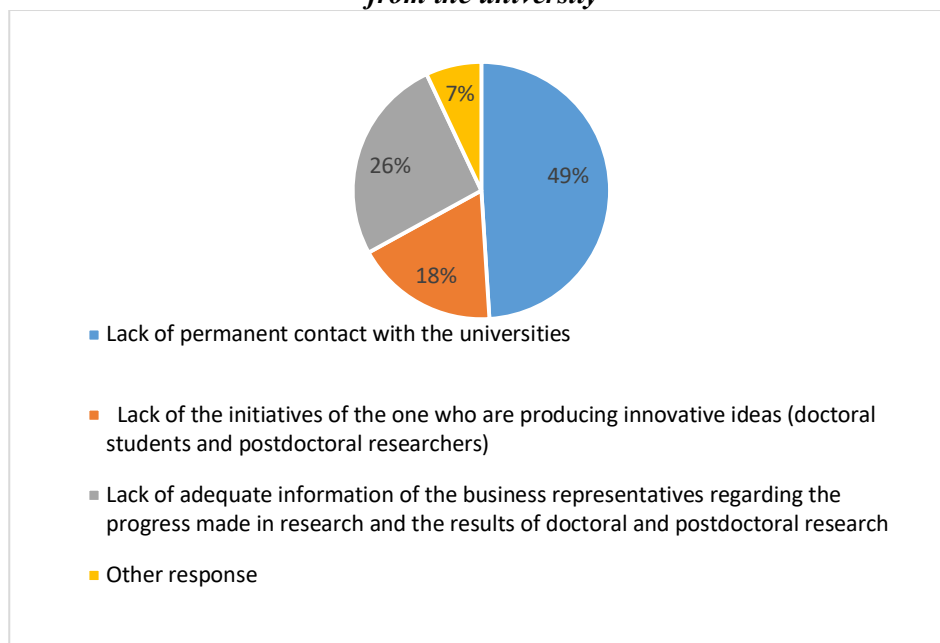
This study was attended by 33 entrepreneurs-administrators of companies, 22 entrepreneurs - company managers, 20 team leaders and 10 heads of departments and product owners and directors, 7 managers/specialists/consultants in human resources, but also 42 respondents with analyst positions (8), security engineers, programmers (2), functional analysts, software testers, business analyst (4), senior recruiters, consultants (4), IT senior software testers, chief executive officers (CFOs), engineers (5), HR specialist, relationship managers (5), international sales managers, employees (3), economists, accountants, organizational development specialists and assistant managers.

Out of the total number of respondents, 49% of the respondents (75), say that the main obstacle regarding a better collaboration between business and academic environment is the lack of permanent contact with universities, 18%, or 28 respondents consider the lack of initiative to produce innovative solutions. Regarding doctoral students and postdoctoral researchers, 26% or 40 respondents consider inadequate information of business representatives on the progress made in research and the results of doctoral and postdoctoral research. Other respondents (7%, or 11 people) mentioned specific obstacles such as: bilateral split, ("neither universities popularize research results enough, nor the business environment is sufficiently anchored in science"), fast speed changes in the field of activity, lack of efficiency, differences between entrepreneurs and representatives of academia in the way each of them perceives and understands the current reality, "poor quality of research", the inability of the academic environment to do researches with applicability, bureaucracy (see Figure 2).

The majority of respondents in the business environment (98% or 151 respondents) do not know online platforms that connect the business environment with human resources in the university environment. Those who stated that they know such platforms mentioned as examples: Startarium, Bionic Turtle forums; Coursera, but also the well-known recruitment platforms: eJobs, Bestjobs, Facebook Jobs, etc. Most of those who responded to this study - 90% or 139 representatives of the business environment, say that the company would be interested in using an online platform through which to have direct, simple, and effective contact with the educational environment (schools, high schools, and universities) so that innovative ideas from the educational environment can be implemented.

Most representatives of the business environment (82 respondents) considered that on such a platform they would like to find practical solutions to the challenges they face in their daily activities, 46 respondents say they have expectations from such a platform through viable contributions to the technological development and digitization, and 22 respondents say they want to find applied research that can be used in their departments to improve certain internal processes.

**Figure 2. The main obstacles regarding the connection between entrepreneurs and the researchers from the university**

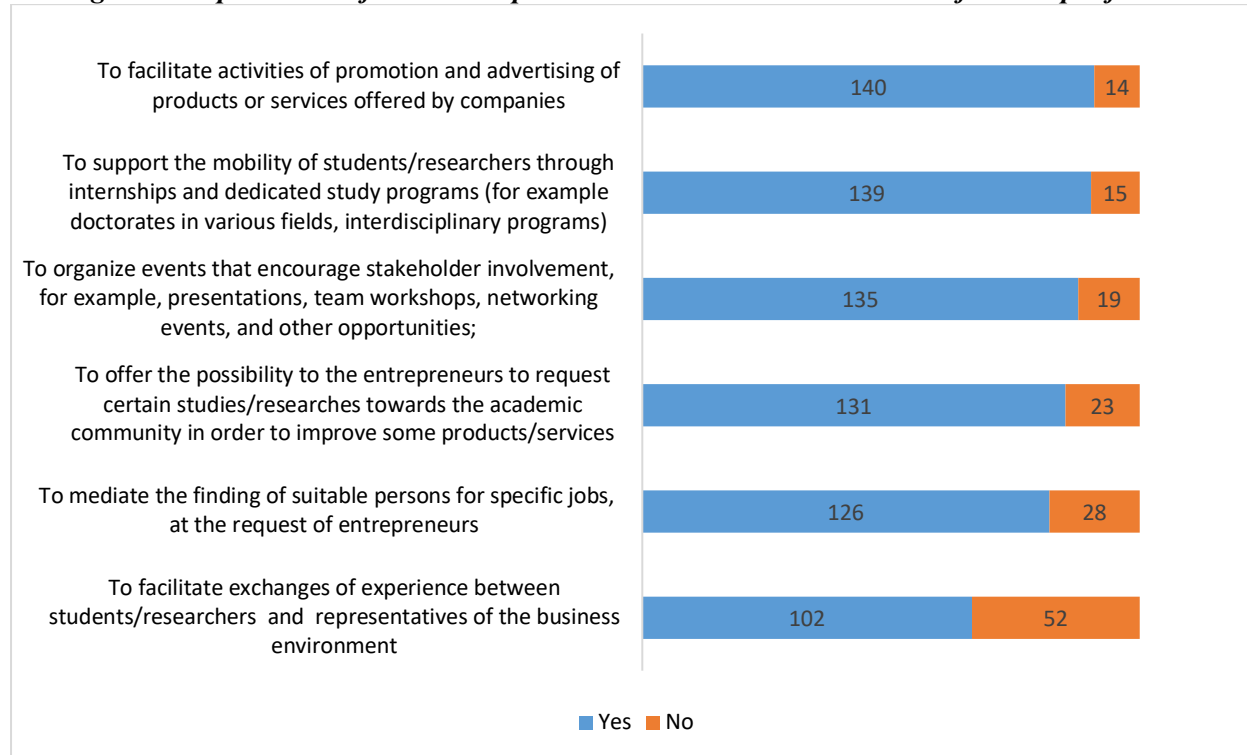


Most representatives of the business environment (82 respondents) considered that on such a platform they would like to find practical solutions to the challenges they face in their daily activities, 46 respondents say they have expectations from such a platform through viable contributions to the technological development and digitization, and 22 respondents say they want to find applied research that can be used in their departments to improve certain internal processes.

Among other benefits they expect from the platform, respondents also mentioned training and recruitment, practical solutions for challenges, and viable contributions. Among the main projects mentioned by entrepreneurs are Remote Solutions / Efficient Digitization and IT. Respondents were asked to specify the level of complexity of the projects that could become available on the platform on a scale from 1 to 5, where 1 - low level of complexity and 5 - high level of complexity. Most of the respondents opted for level 3 complexity (55 respondents) and level 4 complexity (54 respondents). The main expectations of entrepreneurs are presented in Figure no. 3.

Both business and academics have expressed their willingness to use the online platform created to interconnect researchers and entrepreneurs in our country, by creating partnerships, collaborative relationships, and mutual support in solving problems that Romanian entrepreneurs or researchers face.

**Figure 3. Expectations of business representatives on the characteristics of such a platform**



## Conclusion

Universities are working to facilitate the integration of students into the labor market, including by creating partnerships through which students can enroll in internships programmes. Also, if companies need practical solutions for the problems they face, the academic environment should offer solutions through applied research. The main obstacle in maintaining a permanent link between academia and business is represented by the lack of connectivity. Most respondents do not know online platforms that connect the business environment with human resources in the university environment. The proportion of students and researchers in the field of education who do not know similar platforms is higher compared to those in the business environment. On such a platform they would like to find practical solutions to the challenges they face in their daily activities.

## Acknowledgments

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## **Appendixes:**

### **Appendix 1**

Items that were included in the questionnaire addressed to the representatives of the educational environment

1. What is your educational status?
2. Which is the university that you attend in present or you have graduated from?
3. Which are the main obstacles that appear in maintaining a permanent and effective connection between entrepreneurs and representatives of the universities?
4. Do you know online platforms that connect human resources from the universities with the business environment, in order to build and maintain collaborative relationships with positive effects for both parts?
5. Do you think that a platform that offers opportunities for students and researchers to take part in activities that take place in the business environment would be useful, in order to develop their skills and the chance to get extra income?
6. You are interested in using an online platform through which offers you the chance to have direct, simple, and efficient contact with the business environment (SMEs, national companies, multinationals) so that your expertise, research results, innovative ideas can be put implemented and thus get extra income?

### **Appendix 2**

Items that were included in the questionnaire addressed to the representatives of the business environment

1. In which geographical region is the headquarters of the company in which you operate?
2. What do you think are the main obstacles that arise in maintaining a permanent and effective link between entrepreneurs and representatives of academia?
3. Do you know online platforms that connect the business environment with the human resource in the university environment?
4. The company in which you operate would be interested in using an online platform through which to have direct, simple, and effective contact with the academic environment so that innovative ideas from the educational environment can be put in an application?
5. What benefits do you expect from such a platform?
6. Specify the level of complexity of the projects in which you need support from the students/researchers.
7. What are your expectations regarding the functions that such a platform will fulfill?

# ONLINE TEACHING, STUDENT-CENTERED NOWDAYS

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**Abstract:** *The shift from a subject-centered to an educable learning system has driven the reconsideration of learning and teaching. The characteristic pattern can be described as follows, the first movement from teaching to learning was the change of the person in question, the emphasis shifted from teacher to student. The learner transitioned from a passive receiver to an active hunter in the learning process. The next step for the learner was to change when, what, where, how, and why. The student was guided by the educator during this time. This change in learning has not taken place at the same pace in all countries, but has taken place gradually as the overall capacity to support learning-centered learning has evolved. The transit has been present in many educable-focused approaches and has a justified theoretical basis. The main reason for the adoption was to study more effectively and prepare educators to take their rightful place in the society in which they live. The change will take place gradually and may take some time to complete. But in the last year a rapid and drastic change in the online environment has been needed. The school went online and everyone had to adapt very quickly. I think that the students crossed this digital barrier much easier, instead it was harder for them to cross the emotional one. Instead, it was much harder for teachers. Even for the older generation, who stayed their all career in school and know they had to change it with a screen. When you as a teacher, a mentor, you are in the other side of the screen you have to attract the attention of your students more than in class.*

**Keywords:** online, student-centred education, innovation

## Introduction

I chose and treated with great pleasure and interest this topic, both fundamental, useful and exciting for pedagogical theory and practice, with the desire to bring more knowledge in this field. The topic is captivating through its topicality, innovation and importance, requiring a continuous work of research and documentation, in order to be able to focus the learning on the student.

In the educational evolution, the curriculum has undergone several changes, and in the current context of education, the specialists aim at its individualization by teachers, in order to be able to come to the aid of the characteristic needs of educators. Therefore, the renewal of the curriculum emphasizes the transition from a branch of knowledge impossible to reach compared to the speed of information multiplication, to a branch of contextualized action.

This metamorphosis leads to the focus of the teaching act on the final acquisitions of the student - the future teacher, to the possession of key competencies by him, created as a result of completing a curriculum, which are indispensable in the daily life of the learner. Through this paper I proposed a brief approach with complex topics, which also allows access to extensive and diverse bibliography.

## Literature review

The term "curriculum" is of Latin origin and has multiple meanings, but with a similar meaning, such as: running, traversing, passing, running, short look, road; in addition to the denotative meaning, the curriculum also has a connotative meaning, which can be derived from the

following expressions: curriculum solis (course of the sun), curriculum lunae (course of the month) and curriculum vitae (course of life). Its plural form being "curriculum".

From the beginning, "forerunners of Homo sapiens" were able to pass on their culture from generation to generation. Emphasis is placed on the transmission of the technological culture regarding the making of fishing and hunting tools. It is hypothesized that they were achieved through an unwritten curriculum, but at the same time existing. Because there was a concise mission, a certain order to carry out the operations and rules according to which they were carried out. Towards the end there is even an evaluation method with well-defined performance standards.

In antiquity, in the first civilizations, a curriculum similar to one known today as a formal curriculum was highlighted.

At the beginning of the twentieth century we find this term in the United States of America, capitalized in an instructive-educational circumstance that is delimited by time and space. It wanted a change that went beyond the indoctrinated barriers known until then, not just a simple disguise of the word. Specifically, a curriculum was designed that could be passed on to children due to rigid purposes. Leaving aside the terminological significance and deviating beyond programs, plans and content, which symbolized statistic and quantity. Below I will mention some of the first books that use the term curriculum in the title: *The Absolute Curriculum*, C.A. Bowsher, 1900; *The Curriculum in Elementary Education*, H.S. Weet, 1901; *The Child and the Curriculum*, J. Dewey, 1902.

With the development of the concept of curriculum in the twentieth century, the abandonment of the priority given to the subject in honor of the priority given to the educable is initiated, the main idea being to satisfy the need of the learner. While subject-centered learning focuses on a set of knowledge.

The curriculum focused on the educable was also unified with the work of the Swiss psychologist Jean Piaget by treating learning from the constructivist vision. This view implies that educators build and reconstruct their individual knowledge in order to study in an effective way. It follows from the work of the psychologist, that the learning activity is effective when the student feels through his own feelings the construction of learning.

Learner-centered learning presents a pedagogical approach that involves an active learning style, but at the same time involves the incorporation of study programs according to the personal pace of assimilation of the learner. This approach to education from the point of view of focusing on the student requires a fruition of the potential of each learner, but admits that the learner is present and responsible for the evolution in their own education. He will actively choose his goals and manage his learning. Unconsciously but effectively acquiring a new role, namely, the subject of his own training. In addition to individual learning, collaborative learning is also important, where the student interacts with other colleagues. Therefore, the stimulation of learners' creativity is noticeable and the team spirit is highlighted.

Also, the teacher plays an extremely important role on the student's focus in the instructive-educational activities, being much more nuanced compared to the attributions he has in the traditional school. Research conducted in the last 25 years shows that through traditional teaching passivity has been generated in the classroom, learning is present, but its effectiveness is small. We can say that it favored mechanical and reproductive approaches in the study to the detriment of the heuristic ones. It is not enough for students to just pay attention and listen to what the teacher explains, they must have the opportunity to discuss, research and act to a great extent (Crişan, 2013). They need a favorable environment in order to be motivated and to study in depth, which must be provided by the teacher.

The pedagogical practice aims at "capitalizing on theoretical knowledge and laying the foundations for their practical training, by ensuring skills specific to the teaching profession that wants to practice a modern education" (Bocoş, 2007, p.129; Bocoş, 2008). The purpose of

the internship is to guide the student in the use of programs, framework plan and textbooks. But, from my point of view, the real goal is to prepare the educable morally and physically for the road that awaits him from now on. During the internship, he is trained and guided by professionals, in order to be able to easily assimilate all the information he needs to know and use from now on in the preparation of his future children that he will have in your group or in class.

In the process of developing pedagogical knowledge and experience, the student will be guided by his mentor and pedagogical practice coordinator. This relationship, which we can even call a partnership, takes place between the educable and a person with more experience in the field, known as a mentor. Mentoring is not a novelty; the concept is as old as education itself and is reflected by the activity carried out by the mentor in an educational institution along with the practice. The term mentor was adopted in the educational field of Romania in the 80s and replaces what “everyone in education pronounced until yesterday ^ the leadership ^ of pedagogical practice by Methodists” (Bălaș, 2010).

A particularly important component of the teaching process is feedback, because it is one of the most essential motivators of the partnership between student-doctor. Longenecker says that feedback “is necessary to determine the extent to which the message has been understood, believed and accepted” (Pânișoara, 2015). In the mentoring activity, the main goal of the mentor is to release the student's vocation and talent to be a teacher. It can be emphasized that it is a rather difficult task, but also with a lot of professional satisfaction at the end of it.

## **Conclusion**

The shift from a subject-centered to an educable learning system has prompted a reconsideration of learning and teaching. The characteristic pattern can be described as follows, the first movement from teaching to learning was the change of the person in question, the emphasis shifted from teacher to student. The learner transitioned from a passive receiver to an active hunter in the learning process. The next step for the learner was to change when, what, where, how, and why. The student was guided by the educator during this time.

This change in learning has not taken place at the same pace in all countries, but has taken place gradually as the overall capacity to support learning-based learning has evolved. Transit has been present in many educable-focused approaches and has a justified theoretical basis. The main reason for the adoption was to study more effectively and prepare educators to take their rightful place in the society in which they live. The change will take place gradually and may take some time to complete.

It is well known that many educators, both in Romania and in other countries, are focused on teaching the program and are focused on the traditional teaching method. Unfortunately, in the cases presented above, students are passively involved in learning; because they are required to write and listen, not to think, and then they are not fully involved in the content of the subject taught. From the point of view of some teachers, knowledge can be transferred and learned, and then the understanding and clarity of the exhibition will appear together with the reward for patience. Representing the fundamental demands of a valuable teaching. But at the same time a passive child will only take over the information, he is not required to actively participate in the learning process.

The transition from a traditional to a more active and modern methodology involves the educable in the learning process. Instructs him in the study of learning skills and in the essential skills of teamwork and problem solving. The learner-centered approach requires the student to be involved in evaluating the effectiveness of his or her learning process, but at the same time must set goals for future development. This method helps to train the individual in lifelong learning and in the much easier transition to the workplace.

### **Acknowledgement**

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# BLENDLED LEARNING THE CURRENT TREND OF THE EDUCATIONAL PROCESS

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**Abstract:** *As a necessity of today`s needs for learners, blended learning combines traditional ways of learning with those based on technology. The presented material proposes an overall analysis, considering the literature provided, of the possibilities of organizing learning, teaching and evaluation with emphasis on the most used mixed methods. The specialists consider that student`s preparation for the rigors of the society in which they will lately manifest, cannot take place outside the mixed learning.*  
**Keywords:** blended learning, technology use, methods.

## Introduction

Considering the educational context adapted to the contemporary society and the directions of education in general, the educational process becomes a challenge of permanent adaptation, of innovation so as to be efficient to the direct and indirect consumers. The implications of technology in the educational field represent a reality, already accepted, transformed into necessity. Today, we can no longer discuss about education outside this context, even if the specialists in the pedagogical field emphasize the advantages as well as the disadvantages of this fact.

The new tendencies of the educational process impose the use, besides the classical methods, of the modern ones based on technology, in order to increase the attractiveness and efficiency of the school learning. The harmonious combination of the two types of training is called blended learning.

## Literature review

The value of learning in the traditional system is undeniable, but considering the evolution of the technological and pedagogical field, this type of learning represents a necessity for students and teachers. It can be used either as a complement to traditional methods within the same learning sequence, or after/before the learning sequence in order to ensure continuity, consolidation, reinforcement of knowledge. The diversity of online tools, digital educational resources allows a widespread use of blended learning, which can be adapted to the age level of students, their understanding and knowledge. The students are able to work independently but under the coordination and guidance of the teacher.

The advantages of using such a training method are widely discussed in the specific literature, recalling that open educational resources can be created by teachers or students, can be used whenever necessary, or other resources, already realized, can be used, available on the internet.

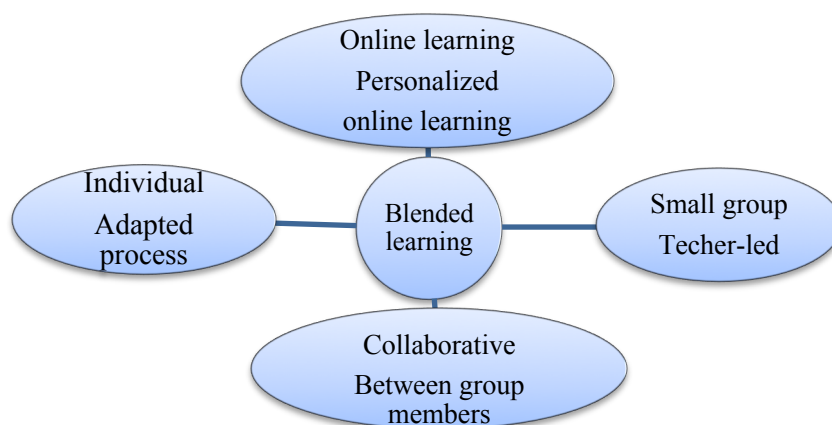
Blended learning methods are in a continuous updating depending on the evolution of the society and the educational sector. These allow maintaining the student-centered education, facilitate autonomous learning through which the learners are responsible for their own learning process. Combining two forms specific to the didactic process, the one with traditional specificity and the one based on the use of technology, allows a wide application, with the involvement of a considerable variety of educators, both, those who prefer and feel comfortable

approaching the face-to-face learning, as well as those who are comfortable using the technology during their own education process.

Graham (2006) defines blended learning as the combination of two different models of education, traditional face-to-face learning and distance learning. Throne (2003) recalls this type of learning as the integration of face-to-face learning and e-learning or remote learning, using theories, methodologies and differentiated learning techniques in the same place and supporting learning with various online technologies during the learning process in the classroom. Other authors consider it the applicable way of integrating optimal educational solutions to achieve goals.

However, we are still looking for answers to questions such as: What is the percentage of the optimal balance between the two forms of learning that defines blended learning? How do we combine teaching strategies so as to achieve a harmonious educational process of blended learning? What are the advantages of making blended learning applicable to learners? What are the disadvantages that limit it?

Regarding this, we appreciate the freedom that this approach, of blended learning, offers us. There is no general formula for organizing and combining strategies. Each applicant can think and apply what he considers useful so as to achieve his goal and to offer a comfortable, pleasant and successful learning path to the students. It is desirable that blended learning, online and instructor-led training, is complementary and creates an integrated learning environment.



**Fig. 1 Integrated learning (Toderic Adriana)**

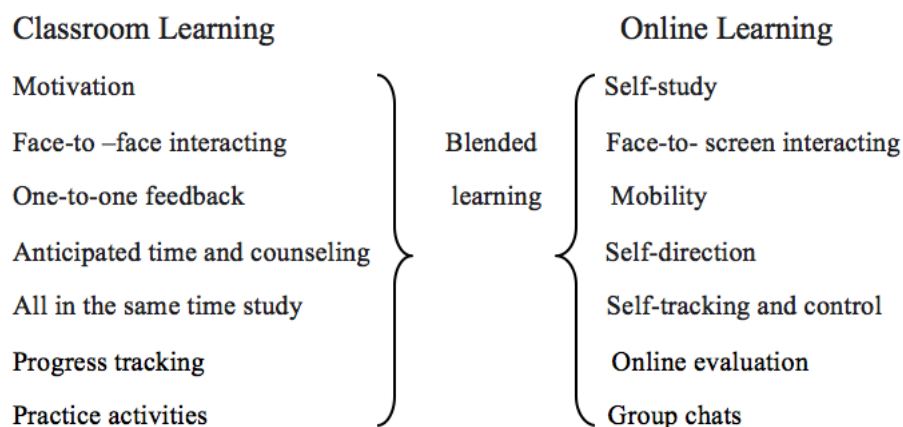
In 2002, author D. Laurillard published "Rethinking University Teaching A Conversational Framework for the Effective Use of Learning Technologies", underlining that the inclusion of technology elements in the teaching-learning process must respect certain limits, depending on the contextual situation, because the excessive use of technology tools does not guarantee school success. Learning exclusively in the virtual environment is precarious for social interaction, it lacks real communication, real affective and emotional manifestations, so mixed learning supports better these elements.

The benefits of applying such learning are multiple and difficult to comprehend all under the spectrum of a single assessment. However, we want to analyze those that experience and literature consider relevant. First, it is suitable for anyone with minimal technological skills, or is willing to develop them. It can be adapted to the needs of each student, whether they prefer the traditional class or learning in a personal space, whenever they feel the need to start the learning process, or prefer a combination of these two. Any educational content can be customized, and its transition from the traditional methods to the digital field, can be easily achieved by using web tools. Each student can find himself in this process giving more or less

importance to traditional or technological sector, depending on his preference and competence, designing his own school career, but coordinated by the teacher.

It offers a unique type of learning to students by asking them for visual, auditory and tactile analyzers at the same time. Participants can discuss, visually analyze information, can create their own learning models, can practice and improve their technical skills along with the possibility of feedback from a teacher. Blended learning is an interactive experience that involves engagement in a relaxing and fun process. Students learn, consolidate or evaluate online content, that students can practice offline depending on availability, successfully adapting to any learning style. Beneficiaries can communicate and browse materials in a variety of ways, at any time and from their preferred device. It should be emphasized that in such a learning experience, feedback is timely and the student's learning path can be permanently adjusted.

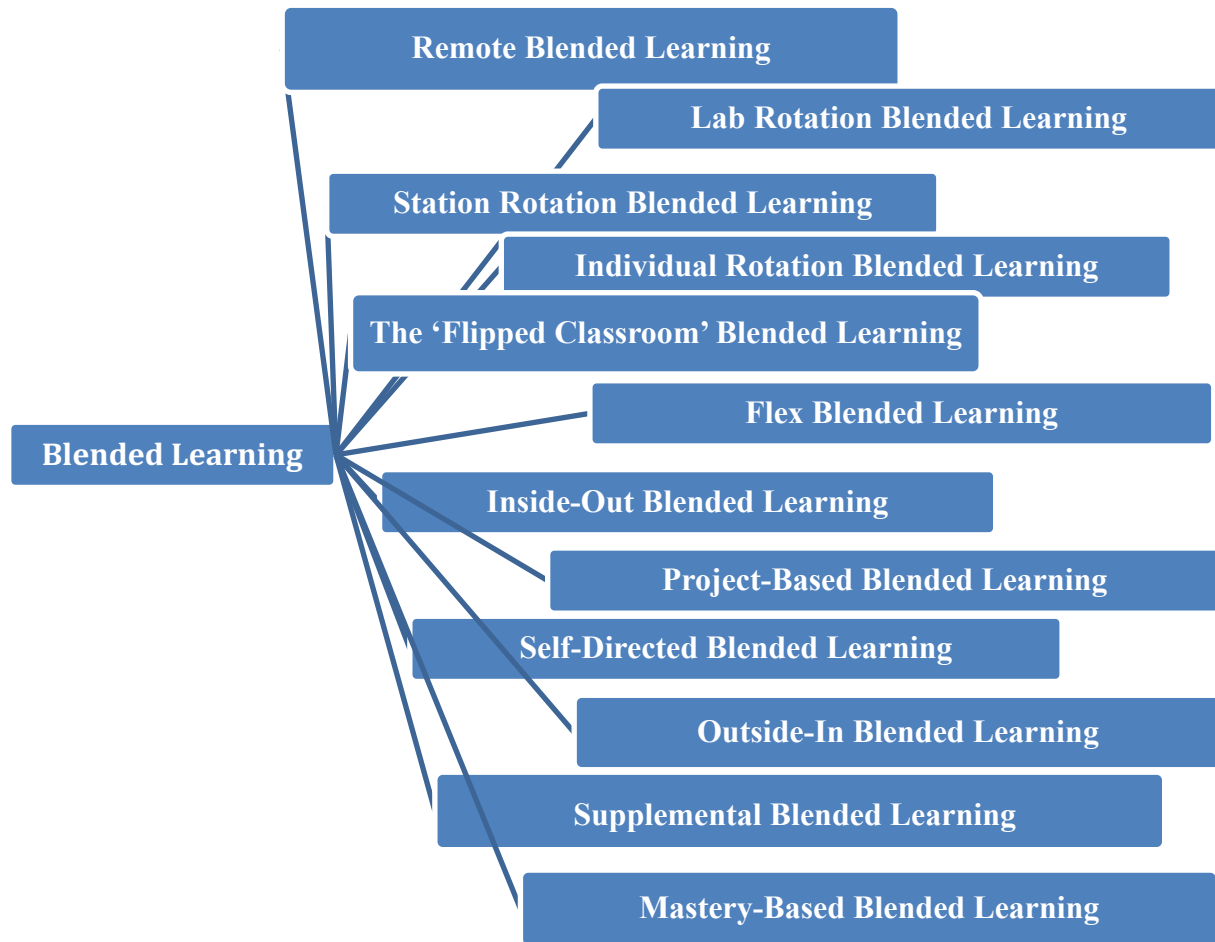
Specialists remind of the tendency to make learning universal. References are directed not only to generalize in terms of space, location, geographical area, but also in terms of students' personality, their needs. If we all have different needs, different ability to understand, why working all in the same rhythm and location? The purpose to achieve competences is a complex challenge that requires creativity from the teacher, in the sense of choosing the most effective strategies, contents, materials, methods, all combined efficiently for the success of the educational beneficiaries.



*Fig.2 The basic elements of blended learning*

Regarding the methods, the specific literature presents a variety of them, precisely in the view of the complexity of mixed learning. However, the most commonly used are the following:





**Fig. 3 Blended Learning methods**

Analyzing the Remote Blended Learning, specialists considered that the specificity of this method is the fact that the students work mostly online and the meetings with the teacher, face to face, are made only when needed, without a predetermined schedule. Thus, students have autonomy in organizing the learning process, requesting real support from the teacher, whenever needed.

The Lab Rotation model of blended learning, similar to Station Rotation, involves the existence of well-organized workshops, using the school's computer lab, or using computers from the school's classrooms, according to a schedule set between the group, students and teachers. This method allows the using of the material provided by the school and the development of combined learning activities inside the student's school.

Station Rotation Blended Learning involves the creation of stations with different educational content for learning or consolidation, which students must go through, following an organized rotation from one station to another, provided that at least one of them is online due to a predetermined schedule. The teacher is free to organize the informational content of the stations and their order, depending on the followed objectives.

Individual Rotation Blended Learning is the method by which students get from the teacher individual work and learning plans, depending on their needs, with content adapted to the learning style of each student. However, students can choose the workshops to participate in, their order and the study program so that they can cope with the assessment requirements and they can be able to achieve the targeted competencies.

The most popular form of blended learning is The Flipped Classroom. It involves a well-organized educational process, in which the traditional learning is harmoniously combined with

those that apply technology, in the sense that the teacher explains the new study content to students in online format, and practice based on it in the classroom, together with other students and teacher too. Thus, the consolidation is organized in a real student-teacher interaction.

Flex blended Learning, students are in a purpose made environment for learning, with existing computers provided by the school, considering online learning the main form of study, with the possibility for students to customize their own learning path, all organized in the presence of a teacher involved in this approach at the request of students, depending on their difficulties. Thus, all the study contents are organized in one place, except for homework.

Inside-Out Blended Learning, as a well-known method, shows that the school activities that start and take place in the classroom, together with the teacher and peers, will continue outside the physical space of the classroom, online. Because new educational content can be transferred for virtual study, and also considered the physical absence of the teacher, it is important that the teacher is able to control the student's study also in the virtual zone.

Project-Based Blended Learning, as the name suggests, is a method based on learning through educational projects. It is a combination of face-to-face interaction with the teacher and colleagues, and online activity. The didactic approach includes the projects through which the students can practice the educational contents. These can also be considered important student's portfolio's elements to ensure feedback and track progress. It is considered to be one of the most popular methods for students but also for teachers.

Self-Directed Blended Learning is a unique way of learning in which student's self-organize, time and resources, combining face-to-face or online meetings with the teacher, in order to form skills and achieve predetermined learning objectives. The biggest challenge for students is to search and find effective content for a given topic, choosing web work tools. For teachers, the challenge is to find the most effective ways to track progress, to keep the student on track. It is an extremely sensitive method, a risky one because the student can deviate from the goal pursued by choosing and studying contents inappropriate to the education content provided, before the teacher becomes aware of this.

Outside-In Blended Learning situations it is opposite to the Inside -Out method. In this case, students initiate the study online and continue it in class. The emphasis is more on traditional learning, the teacher explaining face-to-face the topics the students are interesting in, or even applying a traditional evaluation. Applying this method requires more time because most of the content studied online is updated in the classroom by the present teacher.

Supplemental Blended Learning uses virtual or traditional learning in a way of complementing each other. Thus, if the student participates in face -to- face educational activities, in the classroom, together with the teacher and peers, he will use the online study to complete what has not been done or what has not been done in its entirety, and vice versa. So, it will be chosen a main study method, traditional or based on technology, but in addition to this the other method will complete it.

Mastery-Based Blended Learning is a complex form of organizing the educational process that combines both models, traditional or technological. It is a mixture of teaching, evaluation, and projects-based learning. The success of this method depends on the teacher's skill to combine them efficiently, to find the optimal combination so as to ensure the educational success of the student.

Mixed learning is obviously in a continuous ascent, with more and more beneficiaries and applicants, becoming a necessity of today's rigors, a placement in an increasingly technological reality. Learning thus becomes a pleasant path in which the role of the teacher it is major, and cannot be replaced by any platform or web tool. Guidance and control of learning activities are essential and belong to the teacher. It is desired to train the students for the society in which they will work professionally and socially.

## Conclusions

Thus, group or individual work skills, real or virtual communication skills, computer skills as much as direct work, are absolutely necessary in a modern world. By applying blended learning, such skills can be passed on to students, preparing them for life.

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# STUDENTS' PERCEPTION REGARDING ONLINE AND BLENDED MOBILITIES IN THE ERASMUS FRAME

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**Abstract:** *The European Union took into consideration the idea of the online international activities before the appearance of the COVID-19 having in mind different objectives: to reduce the cost, to increase the number of beneficiaries, to make it more inclusive, to reduce the impact on the environment, to increase the level of digitalization, etc. The appearance of the pandemic generated the acceleration of the implementation of several online international activities, replacing the physical mobilities in some cases. This research has as main goal to check the student perception regarding the online activities in which they were involved during an Erasmus mobility. The feedback is important taking into consideration the new objectives set by the new Erasmus program which are focusing on the increasing number of online and blended mobilities. Even though the objectives are clear, it is important to see how the students think about this type of mobilities after 18 months of online activities. Without a thorough analysis at institutional level, the universities will risk organizing activities that will not be well received by the final beneficiaries. The study will focus on the perception of outgoing students which have participated in the Erasmus mobilities in the last three years, with the purpose to have different type of beneficiaries: students that had physical Erasmus mobilities, students that had blended Erasmus mobilities and students that had online Erasmus mobilities. The results obtained in this study will be used to create the Erasmus strategy for the following years at Babeş-Bolyai University and will give relevant information to other institutions in organising Erasmus mobilities.*

**Keywords:** Erasmus mobility, pandemics, online learning.

## Introduction

This paper was generated by the need to make research on the student's perception towards the virtual mobility, blended mobility and short mobility organized in the Erasmus frame. The Higher universities are pressured to make changes by different factors: European education policy, national regulations, market evolution, European regulations, increasing/decreasing demand in different fields, etc.

Before the implementation of any new activity in the Erasmus program, the Erasmus office from Babeş-Bolyai University is conducting a research targeting the beneficiaries in order to verify that there is a demand at university level from the academic community.

The changes regarding the organization of the mobilities were predicted to happen (European Commission, 2019; Mato-Diaz & Nanclares, 2021) even before the COVID-19 pandemic as a result of different new European policies that take into consideration the extension of digitalization in the mobility experience.

Digitalization and lower impact on the environment represent key elements in the new mobility policy, outside the pandemic situation. Even though there were trends in this direction long before the pandemic situation, 2020 accelerated the digitalization of the mobility, by creating a unique situation. There are advantages in both types of academic experiences (Bruce, 1989), but the implementation on long term in the same time demands extra allocation of different

resources at university level which will be difficult to manage by international offices. The demand for international online experiences from students will be a key factor in keeping this type of mobilities on long term, especially for long term mobilities.

### Literature review

Even though is more and more mandatory to incorporate a mobility in the academic program for the future professional life, factor that is determining the increasing of the demand, the number of studies done on the impact of mobilities are still low.

Several authors tackled the idea of online education Gilroy Marilyn (2011; Helm, 2019) underline both the challenges and the benefits, while some authors the long-term benefits of international mobilities (Dias et al, 2021). The year 2020 (Mato-Diaz & Nanclares, 2021) created an unexpected opportunity to see how this mobilities can be implemented and to research the impact that it will have at university and beneficiary level. Students and universities were forced to rapidly adapt to online courses and to different situations: students at host university participating to online courses, hybrid activities, students in the home country participating online to the international academic life, etc.

The international student experience was reduced significantly in 2020 having a great impact on student perception towards the academic mobilities. There were several researches that analyzed the impact of virtual academic activities on students, especially their perception, the possibility to replace physical mobility with online ones (Diaz, Nanclares, 2021). There are not too many studies on student perception regarding their vision towards the future of online international experiences as a long-term possibility to replace partially the physical ones.

### Methodology

The data collection consisted in applying questionnaires within Erasmus outgoing students at Babeş-Bolyai University. In the survey the participants were asked questions regarding their opinion towards virtual mobility, blended mobility or short time mobilities.

First, the research inquiries into the extent to which online learning may be an alternative to physical student mobility and second how the future Erasmus short mobilities are seen by the potential beneficiaries.

The data collection took into consideration students from Babeş-Bolyai University, especially the ones that benefited by an Erasmus mobility in the last three academic years. The target group was composed by students between 20 and 35 years old (bachelor, master and PhD ). The survey was applied on June-July 2021 by the Erasmus Office of Babeş-Bolyai University to former Erasmus students from several faculties, different fields of study.

*Table 1. Representation of faculties among the sample*

No.	Faculties	percentage
1	Faculty of European Studies	11.27%
2	Faculty of Economics and Business Administration	11.75%
3	Faculty of Law	2.64%
4	Faculty of Physics	1.44%
5	Faculty of Biology and Geology	2.40%
6	Faculty of Chemistry and Chemical Engineering	2.40%
7	Faculty of Geography	5.04%
8	Faculty of Environment Sciences	0.24%
9	Faculty of Political, Administrative and Communication Sciences	7.19%
10	Faculty of Business	8.15%

11	Faculty of Mathematics and Computer Sciences	8.87%
12	Faculty of History and Philosophy	7.19%
13	Faculty of Psychology and Educational Sciences	6.24%
14	Faculty of Reformed Theology and Music	5.04%
15	Faculty of Roman-Catholic Theology	1.68%
16	Faculty of Orthodox Theology	0.96%
17	Faculty of Letters	13.19%
18	Faculty of Sport and Physical Education	1.20%
19	Faculty of Theatre and Television	2.16%
20	Faculty of Sociology and Social Assistance	0.96%

The target group was consisted by former Erasmus students taking their personal experience with the international learning environment. We considered that their experience will be essential to the purpose of the survey. Even though we focused on the former Erasmus students, there were some answers from students that did not participate in an Erasmus mobility. A percentage of 99.52% from 417 respondents, participated in an Erasmus mobility in the following academic years: 31.40% - 2018/2019, 34.88% - 2019/2020 and 33.72% - 2020/2021.

We aimed both students that benefited from online courses and students that were in Erasmus mobilities before the pandemic. A percentage of 48.44% had online courses during their mobility, while 51.56% did not had online mobilities.

The research tried to find answers to the following questions:

*Q1. Is the virtual mobility an interesting option for the outgoing students?*

*Q2. Is the blended mobility more interesting than the physical or virtual mobilities?*

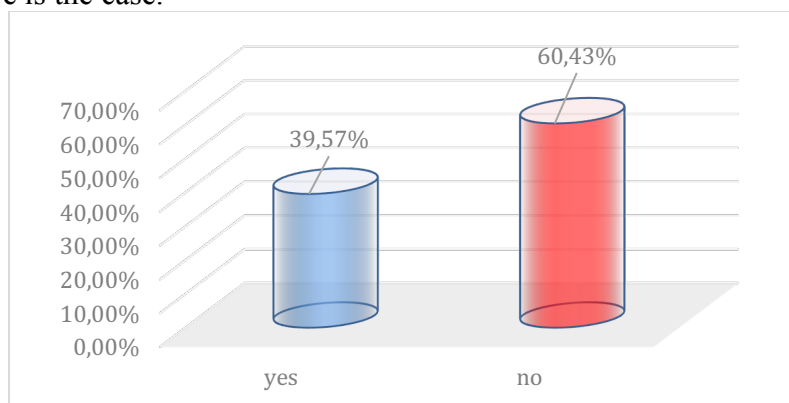
*Q3. Is the short mobility attractive for the potential beneficiaries?*

The findings obtained in this research will support the Erasmus Office and the faculties to adapt the new opportunities to the student's demand, especially that the number of international mobilities decreased in the last year.

## Results

The purpose of the research was to find out the student's perspective regarding the new opportunities in the Erasmus program in order to be able to adapt accordingly. The most important question was if the students will participate to an online mobility if there is not a pandemic situation.

The answer puts in evidence the fact that higher percentage will not participate, but still there is a significant group of students that will take into consideration online international activities if there is the case.



**Figure 1. Do you want to participate to an online Erasmus "mobility" if there are no restriction as a result of the pandemic?**

However, the results obtained put into evidence the fact that most students will prefer physical mobility if they can choose. A percentage of 88,73% will prefer physical mobility, 9.83% blended mobility and just 1.44% online mobility.

This results clearly underline student's preferences towards the physical mobility and the fact the online international activities are taking into consideration if there are some other factors to motivate them to participate. We tried to gather information regarding their perception of the online mobilities by asking them to scale the following affirmations:

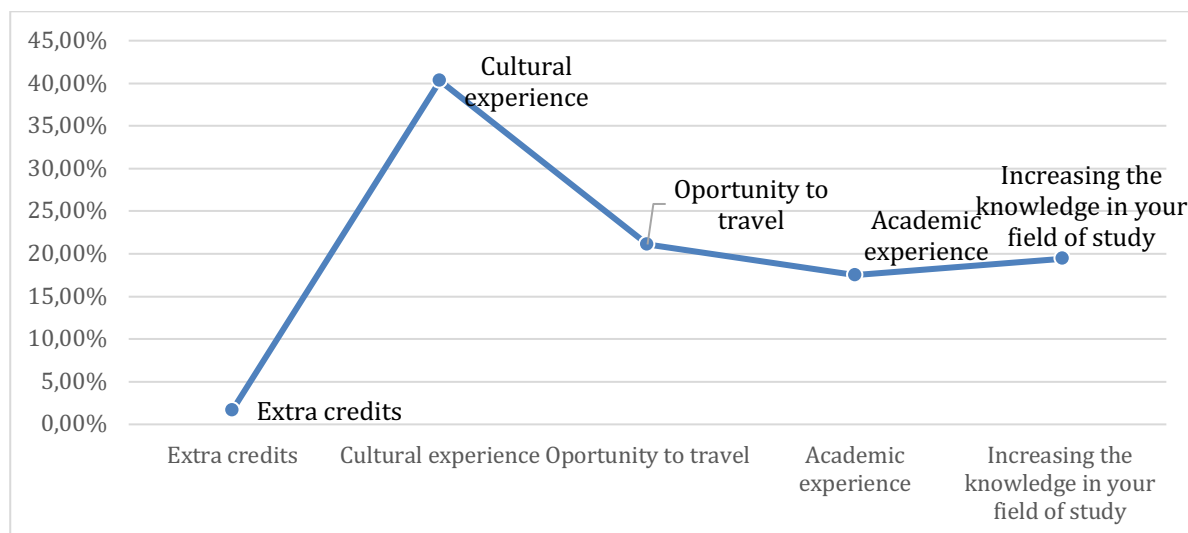
**Table 2. Students opinions regarding international mobilities**

Affirmations	excellent	good	average	poor	extremely poor
The online mobilities are offering you the possibility to interact with other students	10.58%	14.90%	23.08%	24.76%	26.68%
The online mobilities are offering you the possibility to experiment another culture?	11.75%	13.19%	12.95%	20.62%	41.49%
The online mobilities can replace the physical ones?	20.38%	6.24%	5.28%	7.91%	60.19%
The online mobility can be considered an international academic experience?	12.26%	18.51%	26.92%	20.91%	21.39%
The academic experience exchange is efficient even online	8.87%	15.35%	27.10%	23.02%	25.66%
There are no differences between the two types of mobilities	17.51%	5.52%	7.91%	11.27%	57.79%

We can observe that a lower percentage of students have excellent opinions regarding the results obtained online especially regarding student interaction, the possibility to interact with other culture and its efficiency.

As the short mobilities will be launched from this fall in Europe, 88.01% of the respondents are thinking to a short mobility and just 11,99 % will refuse one. It was also surprising to see that the respondent's answers put in evidence a very interesting aspect: 77.94% prefer 30 days' intensive programs, 8.15% prefer 21 days, 11.75% prefer 14 days and just 2.16 prefer 7 days' intensive program.

The higher institutions have to market the academic programs so it is important to know which are the motivating factors for students to choose a short Erasmus mobility. We considered important to address this issue in the survey to see what will determine our students to participate to these intensive programs.



**Figure 2.** Which of the following factors will motivate you to participate to a short mobility?

We can see that the extra credits are not a motivating factor for the students, while the cultural experience is the most important one, followed by the opportunity to travel. The academic experience and the increasing knowledge in the study fields are also to be taken into consideration in the marketing activities and the design of the program.

## Conclusions

This study represents just a starting point in analyzing the future impact of the new Erasmus mobilities at university level and the evolution of the demand in that area. Results obtained put in evidence the fact that students will definitely prefer a physical mobility and even though there were some good results obtained during the pandemic, students are not 100% satisfied regarding the cultural experience obtained. Of course, we must take into consideration the fact that the abrupt digitalization of mobilities focus more on the learning part, than on the social, cultural, psychological aspects of the mobility.

Another interesting aspect is the fact that blended mobilities are not that appealing to students, which is creating an interesting situation as all the short mobilities under the Erasmus program for bachelor and master must have a virtual component. However, students are interested on short mobilities, but the higher percentage of the answers are focusing on one-month intensive programs, while most of the summer schools are organized on shorter period.

## Acknowledgement

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# PRINCIPLES FOR PROMOTING IDENTITY EXPLORATION WITHIN THE CURRICULUM: A CRITICAL ANALYSIS FOR THE ROMANIAN EDUCATIONAL CONTEXT

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**Abstract:** *The article analyzes the applicability of the principles for promoting identity exploration within the curriculum (The PRESS model of identity exploration, Kaplan et al., 2014) in the context of Romanian educational system. The four tenets of the PRESS model represent the basis for identity exploration interventions within the school curriculum (Kaplan et al., 2014; Sinai et al., 2012). Our main purpose is to critically analyze if this model is suitable in the Romanian school curriculum. We tap into educational system particularities that would be helpful and/or hampering for implementing this type of intervention. The main research questions that we approach are: (1) Is the Romanian educational context prepared to address the promotion of relevance, exploration triggers, facilitation of a sense of safety, and scaffolding of exploration within its curriculum? (2) How can teachers adapt their teaching and planning to promote identity exploration during classes?*

**Keywords:** identity exploration, adolescence, PRESS model, curriculum intervention, Romanian educational context

## Introduction

Adolescence represents an important period of identity exploration which refers to accessing opportunities that facilitate self-reflection, finding answers about who one is and who he/she wants to become, what kind of interests and values does he or she has, what is important and why (Kaplan & Flum, 2006; Kaplan et al., 2014; Meeus, 2011). Also, an adaptive development of identity is related to positive emotions, with increased openness to experience and with increased motivation and school engagement which help adolescents to cope with uncertain moments (Kaplan, et al., 2019; Kaplan et al., 2014; Meeus, 2011; Sinai, et al., 2012). Adolescents need adapted learning environments and guidance for developing their identities and for taking decisions related to their future selves (Heffernan et al., 2017; Kaplan et al., 2014; Oyserman, 2015; Oyserman et al., 2017; Sinai et al., 2012). Using explorative tasks, students are allowed to connect with the environment and to be curious about what parts or features could be meaningful for them (Flum & Kaplan, 2006).

## School context and adolescents' identity development

Identity development in adolescence is under the influence of a variety of social factors (e.g., relationships with parents, peers, and teachers; Hazari et al., 2015; Kaplan et al., 2014; Meeus, 2016; Sinai et al., 2012). Students spend most of their time in school activities where they should prepare for managing life challenges and for becoming involved in the development of society. Throughout their educational paths, students have the opportunity to create bonds

with a substantial number of teachers who have the chance to influence their identity development purposely or not (Verhoeven et al., 2019).

Teachers, as important factors for students' school motivation (Negru & Damian, 2010), seem to have a great impact on students' identity development through their attitudes, beliefs, and expectancies. In some cases, students may perceive these expectancies as being stressful and feel not good enough to achieve them or, in other cases, teachers succeed to create a safe space where students can share their beliefs and thoughts, because lesson contents are more relevant to their personal experiences (Berg, 2010; Hazari et al., 2015; Rudd, 2012; Smith, 2008). Also, students' knowledge about themselves are impacted by others' beliefs about them and their educational experiences are a predictor for their school engagement (Kaplan & Flum, 2009). Verhoeven et al. (2019) bring to attention that for assuring a place where students can develop their identity exploration, they need meaningful learning experiences, related to their backgrounds, needs, and a supportive classroom climate, which represents a predictor for students' motivation (Bong, 2008).

### **Theoretical framework**

The PRESS model of identity exploration represents four principles detailed by Kaplan et al. (2014) and adapted in order to be used within classroom contexts and applied by classroom teachers with the support of researchers. The model brings the students to the center of educational processes facilitating the exploration of their interests, values, and principles by asking questions, using, and developing their critical thinking and taking time for self-reflection. Also, the entire process of exploration is conducted during classes with the guidance of the teacher and lessons are adapted using the four principles of the model: promoting relevance, triggering exploration, facilitating the sense of safety and scaffolding exploration (Kaplan et al., 2014; Sinai et al., 2012).

As described by authors, *promoting relevance* refers to the adaptation of the content and activities to students' experiences and backgrounds. This step implies that teachers need to know better their students and to encourage them to put themselves in relation with the academic content, being in this way more active and responsible in the learning process. After students understand the importance of the learned content and the connection between it and themselves, the chances to be more interested could increase.

The next step is represented by *triggering exploration*. It is based on questioning aspects about themselves by critically analyzing what do they know about their perceptions, values, and interests and how could they relate to the content from this perspective. As authors predict, this kind of process might be interpreted as frustrating or stressful by students. In this way, they need to feel comfortable to explore, to look for answers, and to share them with the other peers. For this, *a sense of safety* is mandatory. As we mentioned above, a friendly classroom climate will help students engage and feel free to open their minds without being judged (Hazari, 2015; Rudd, 2012).

Further, students need to know how to go through this path of exploration using *scaffolding exploration*. For applying this last step, interventions contain activities that involved teachers' experience as model, peer collaboration, and role playing. Also, the process of *self-reflection*, which is an important aspect of triggering exploration, was assured during classes. Students' were given written assignments in which they had to note aspects about the meaning of the learned content for their personal experience. Also, they had to write about personal thoughts and emotions they had during classes or how could they use learned information in their daily experiences. The model was applied within interventions conducted by teachers who were instructed by researchers in three subject domains: literature, mathematics, and environmental education.

The model has two main advantages: (1) it promotes a student-centered learning approach, engaging them actively, helping them to explore and to find the meaning of the learning path; (2) it represents an approach that has increased chances to maintain student motivation to engage in identity exploration.

The aim of the paper is to critically analyze the measure of which the above-mentioned principles could be applied on the actual practices used in Romanian educational system. We intend to look for answers for the following research questions: (1) Is the Romanian educational context prepared to address the promotion of relevance, exploration triggers, facilitation of a sense of safety, and scaffolding of exploration within its curriculum? (2) How can teachers adapt their teaching activity and planning to promote identity exploration during classes?

One of the main general problems is that it is hard for students to find their motivation to study and to understand the importance of the learned content in their daily lives (Heffernan et. al, 2017; Slot et al., 2020). Another specific issue is that the Romanian educational system has an increasing drop-out rate among students (Bădescu, 2019). Also, most Romanian educational practices tend to have a directive approach within most of the students are passive learners who are not encouraged to take the responsibility for their own academic decision (Negru-Subțircă, 2019).

### **Romanian educational context**

Romania is a post-communist country and the system's consequences are still activated in society's attitudes and beliefs with the tendency to be more conservative. The educational system needs to improve its approach related to student centered learning and to create more chances for students to know themselves and to be a main agent of their educational development by self-reflection exercises, exploration of new opportunities, and adapting the curriculum to students' needs and backgrounds.

Romanian teachers have both traditionalist and constructivist beliefs about teaching (Bădescu et al., 2018; Negru et al., 2011) which means that they have approaches that are concentrated on delivering information and approaches that offer guidance to students and help them to engage in their educational process (Lim & Chan, 2007). Another study (Bădescu et al., 2017) brings to attention that Romanian teachers have the tendency to approach the traditionalist manner of delivering knowledge to have the classroom control. This aspect might put under question their openness to include into the lesson's plan activities that might give students the chance to explore and express their thoughts and feelings about content and making them active learning agents.

In the study conducted by Bădescu et al. (2018), Romanian teachers reported that the quantity of the information that needs to be delivered within classroom is too large, meaning that they do not have so much time to deliberate other aspects during classes. Even though 86.7% of them declared feeling confident in their abilities of teaching critical and autonomous thinking, students still need opportunities and time to explore and to reflect the learned content. In this way, the lessons that give students the role of passive learners must have a more active approach. Other aspect reported by the teachers in this study is that a great percentage of them are not open to social diversity (e.g. over 60% of them would not support the marriages between people of same sex and 32.4% of them would not agree to live surrounded by immigrants) (Bădescu et al., 2018).

Another important aspect is that 13.1% of the Romanian teachers still consider that students of Roma ethnicity should have separated classrooms from their peers. These aspects could represent an issue when we are talking about facilitating the sense of safety within classroom, because of the teachers' beliefs. These statistics are in contrast with the fact that over 90% of the teachers consider that teamwork, cooperation and tolerance are values learned by students within school context (Bădescu et al., 2018).

Another aspect that might be an issue is represented by the national exam for teachers. If we look at the references from each domain's syllabus which were updated in the current year (2021), we will see that less than a half from the subjects do not have at least 50% of the references published in the last 10 years (2011), but older. In this way, teachers must learn some pedagogical information that might not be in accordance with the latest research approaches in education. Hence, continuous professional development courses must approach the idea of identity exploration for students within classroom and give teachers the necessary support and information of what does it mean, how these principles could improve students' engagement and motivation and how they should be applied. Also, an important finding suggests that pre-service teachers that have opportunities for their identity exploration are more willing to approach activities centered on students' needs (Negru et al., 2011).

Another issue that might affect the classroom climate and students' tendency to open is bullying. In 2016, World Health Organization (WHO) classified Romania on the 3<sup>rd</sup> place for the bullying behaviors frequency in schools. For managing this kind of situations and transforming classroom into a more comfortable context, school counselors and teacher must be in continuous collaboration, and they also must pay attention to both student-student relationship and student-teacher relationship.

## Conclusion

School context is one of the key factors that influence students' identity formation and exploration and its main aim is to concentrate on the learners' adaptive growth. In this way, attention must be paid to teachers' beliefs and attitudes and on its impact upon students' identities. Also, another point that needs to be considered is how Romanian teachers' abilities are developed and sustained across time and how information about the importance of students' identity exploration is integrated within continuous professional development courses. Lesson planning should integrate in its structure time dedicated for reflection and for integration of the content with personal aspects and personal experiences that will help students to take more committed vocational and life decisions (Faircloth, 2012; Negru-Subțirică, 2019).

Romanian students need more autonomy in their learning environment, and they need to explore, to ask questions about themselves and to find answers. The change can be made by adapting the curriculum to give students' support that will help them to relate to the content and to see its importance in their lives – in this way the probability of increasing their motivation for school will be higher (Negru-Subțirică, 2019). By having an increased and sustained motivation for school, students' will be tended to explore more, in breadth and in depth and this will help them to be more engaged with their decisions (Kaplan et al., 2019; Verhoeven et al., 2019). And all of these might happen when Romanian teachers will be trained and supported to plan in a continuous way their lessons using evidence-based interventions centered on students' needs for learning and on transforming school context in a meaningful experience.

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# RURAL EDUCATION AS FAMILY HERITAGE

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**Abstract:** *Throughout the history of human development, poverty has consistently been one of the major issues affecting many countries of the world, especially nations with low levels of education. Among Romania's diverse and complicated problems, the intergenerational transmission of poverty (ITP) is the most widespread and deep-rooted problem in rural communities. Although there have been significant efforts to reduce the deprivation rate, the most challenging problem is that impoverished households in rural Romania often descend into poverty for generations. From the economy and societal perspective, the ITP process may be slowing down growth, producing delinquency as a result of lack of social cohesion and equality of opportunities. Based on the findings of this paper, the ITP could be an obstacle in the framework of a reform that requires financial restraint and economic restructuring. The connection between parents and children socioeconomic status, may be statistically important in indigenous populations (including ethnic, cultural groups) whose children have lower levels of education or not education at all. This unfortunate situation is the sum of several complex factors, such as discrimination in the market place or business field that reduces the value of education, increased fertility records, lack of school opportunities, poor quality of education and sometimes malnutrition, among other factors. Although these issues have been long debated, this paper aims to provide a very brief overview of an extremely vast field, with focus on Intergenerational Transmission of Poverty (ITP). Due to the fact that children from chronically poor environments are more likely to drop out, never enrol in school or obtain low achievements, "education is the single most important factor in stopping the transmission of poverty from parents to children." (O'Connell, 2013, p. 1) It is not only low incomes that keep children out of school, but often it is a multi-dimensional table of disadvantages that overlap and many of them are transmitted through generations. A better understanding of the mutual condition between education and poverty determined by intergenerational inheritance, could provide the necessary background for new and adequate policies.*

**Keywords:** heredity, social learning, family influence, socio-cultural handicap, ITP

## Introducere

Din punct de vedere etimologic, termenul "educație" provine din limba latină și se derivă din substantivul "educatio" care semnifică creștere, îndrumare, cultivare (Lewis&Short, 1891, p. 627). În istoria gândirii pedagogice, educația sugerează "drumul parcurs de copil în devenirea lui, ca rezultat al influențelor favorabile de ocrotire, îngrijire și sprijinire" (Palicica, 2002, p. 11), aspecte ce apar încă din secolul XVII, în ceea ce la vremea respectivă se numea modelul de educație perfect și complet – "Didactica Magna".

Prima treaptă a sistemului de învățământ după Comenius era reprezentată de educația în familie, etapă care se desfășura până la vârsta de 6 ani. Cu toate că învățăturile marelui pedagog erau adresate ambilor părinți, este interesant de observat faptul că pronunția, gramatica și exprimarea au fost lăsate în grija mamei. Mai mult, Comenius publică o lucrare centrată pe formarea copilului în primii ani de viață pe care o denumește "Școala maternă" și a cărei necesitate s-a născut din conștientizarea diferențelor de dezvoltare între copii; în momentul înrolării în școala elementară, elevii trebuiau să constituie un grup omogen și să dețină cunoștințe din domenii precum metafizica (imagini generale asupra lumii), fundamentele opticii (deosebirea culorilor, a umbrelor, a luminii), bazele astronomiei, istorie, geometrie, aritmetică, teoria morală, dialectică, retorică și mai ales, gramatică. Scopul acestei școli desfășurate în sânul familiei nu este numai cunoașterea limbii materne și a mediului înconjurător, ci progresul tinerei generații - "Pârghia principală a neamului omenesc stă în leagăn, pentru că de început depinde totul, atât răul, cât și binele, încotro se îndreaptă cineva,



într-acolo și merge, în urma capului, trupul și în urma oiștii, trăsura” (Comenius, 1858, p. 1). ”Școala maternă” din traducerea cehă ”Infarmatorium skoly materske”, a fost scrisă între anii 1627-1629, însă a văzut lumina tiparului abia după două secole.

În ultimii ani, analiza mecanismelor învățării și cercetarea cauzelor insuccesului școlar, s-au orientat cu precădere către mediul de proveniență al copilului, pornind de la ipoteza că un context de dezvoltare inechitabil, nu poate să asigure referințe culturale minime necesare. Psihologul american Albert Bandura, atrage atenția asupra învățării sociale și a faptului că individul absoarbe informația numai privindu-i pe ceilalți, iar în situații ulterioare utilizează această informație drept ghid pentru acțiunile proprii. Imitarea comportamentului uman, în special în primii ani de viață, reprezintă o formă de învățare des întâlnită în familia tradițională, unde copilul ajunge să discearnă care valori sunt aprobate în societate. În unul dintre cele mai reprezentative studii ale sale, psihologul a cercetat felul în care copiii sesizează și reproduc un comportament deviant în urma vizionării unui film cu conținut violent (Bandura, 1977). Copiii au fost împărțiți în trei grupuri și fiecărui grup i s-a prezentat o consecință diferită a acțiunii agresorului; primul grup a observat că agresorul a fost pedepsit pentru comportamentul său, al doilea grup a observat că agresorul a fost răsplătit, iar cel de-al treilea grup nu a văzut nicio repercusiune. Pe cale de consecință, grupul care a asistat la recompensarea adultului agresiv, a dezvoltat un comportament similar și mai mult, în momentul în care celorlalte două grupuri li s-a oferit o recompensă pentru imitarea comportamentului agresiv, întreg eșantionul s-a angajat fără ezitare în acțiuni agresive. Rezultatul experimentului a arătat că dezvoltarea cognitivă urmează o traiectorie clară ”de la social la individual, și nu invers” (Sălăvăstru, 2004, p. 27), aspect ce a delimitat procesul mimetic în două faze: cea de *achiziție* a informațiilor și cea de *performanță*, în sensul reproducerii comportamentului asimilat la un moment dat, când situația o impune. Preocupați de factorii care determină imitarea, atât Bandura cât și alți specialiști în psihologia cognitivă (Vygotsky, Piaget), au generat câteva concluzii în această direcție: sunt imitate în special comportamentele recompensate, modelele masculine cu status superior (autoritare), modelele competente, similare, față de care imitatorul este legat afectiv.

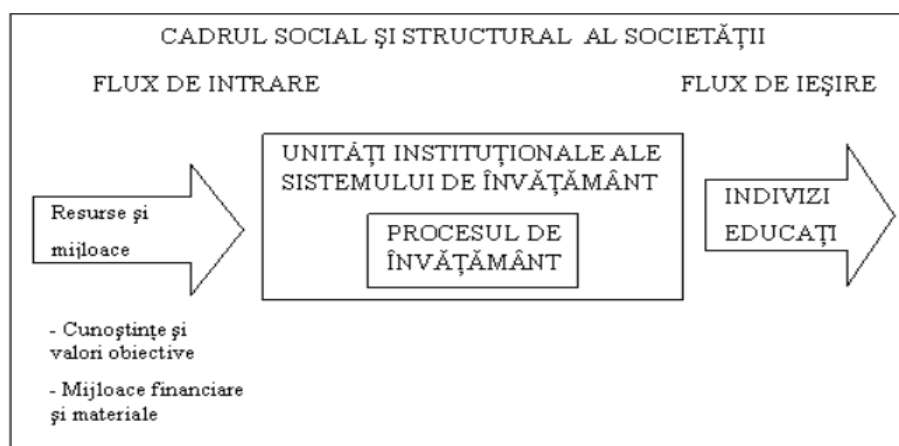
Situația economică a familiei din spațiul rural este de cele mai multe ori considerată principalul factor de abandon școlar timpuriu, produs în multe cazuri înainte de finalizarea educației obligatorii. Această perspectivă este cunoscută sub numele de *Teoria handicapului sociocultural* (Sălăvăstru, 2004, p. 153) care susține că traiectoriile școlare sunt drastic impactate de inegalitățile de dezvoltare. În ciuda faptului că ideea echității și a coeziunii sociale reprezintă un subiect intens dezbătut la nivel mondial, ”orice investigație asupra eșecului școlar va găsi o relație între frecvența acestuia și mediul socioeconomic al copilului aflat în dificultate” (Sălăvăstru, 2004, p. 153). Sărăcia, îndeosebi constatată în mediul rural, determină multe familii să-și retragă copiii de la școală deoarece cheltuielile aferente depășesc veniturile lunare. Lipsurile înregistrate se transformă de multe ori în conflicte intrafamiliale, la care elevul devine martor și acumulează frustrări care îi afectează calitatea prestației școlare.

Pe termen mediu și lung, relațiile tensionate între părinți pe fondul insuficienței resurselor, determină inadaptarea copilului la cerințele curriculare și scăderea randamentului până la repetenție. Totuși, există autori care susțin că succesul copilului depinde mai mult de factorii culturali și de nivelul de pregătire al părinților, decât de condițiile de trai. Bagajul cultural depistat în familie sub forma atitudinii față de educație, limbajului utilizat, practicilor de natură culturală sau a valorilor promovate, arată că „...rar se întâmplă, în afara cazurilor unor influențe masive, ca un singur factor să fie suficient pentru explicarea eșecului școlar. Acest eșec este, în general, supradeterminat de factori multipli, ale căror efecte se îmbină și se stimulează reciproc.” (Gilly, 1976, p. 274). Efectele cumulative ale insuccesului au o greutate puternică în forul interior al elevului și se oglindesc în conduite deviante precum absenteismul, abandonul școlar, violența, delincvența.

Reușita școlară se află într-o relație de interdependență cu performanțele lingvistice și evoluția intelectuală a copilului. Limbajul are un rol decisiv în însușirea culturii, însă divizarea acestuia în cod restrâns și cod elaborat nuanțează cum nu se poate mai elocvent, avantajele și dezavantajele de debut în sistemul de învățământ primar; codurile restrânse folosite de familie în abordarea copilului, formate din sintaxe simple, rigide și vocabular relativ sărac, plasează elevul în poziția dezavantajoasă de a nu accede la noțiunile complexe promovate în școală. Pe de altă parte, codul elaborat, specific familiilor cu statut socioeconomic și cultural înalt, se caracterizează printr-un vocabular bogat, cuvinte și fraze complexe care pot reda gândurile și intențiile în mod rațional și explicit. În timp ce codul restrâns este accesibil oricui, codul elaborat este restrictiv, astfel că se creează încă de la început un avantaj de continuitate și consolidare a informațiilor dobândite acasă, în cazul copiilor care provin din familii dezvoltate sociocultural. La polul opus se află elevii care nu stăpânesc decât vocabularul limitat și se văd obligați să se adapteze rapid la structuri de comunicare și relaționare diferite de cele învățate în familie.

Această bulversare a credințelor și prăpastia ce se formează între casă și școală, are un impact atât de profund asupra copilului, încât teoreticianul Pierre Bourdieu i-a atribuit conceptul de "violență simbolică". Termenul a căpătat o amploare deosebit de controversată, îndeosebi atunci când a fost asociat cu școala, caracterizată drept "un loc de monopol și de violență legitimă" (Bourdieu, 1970, p. 54) și în cadrul căreia se încearcă reproducerea socială a elitei, într-un sistem de învățământ care se vrea a fi egalitar, dar nu este. E lesne de observat că în societatea modernă întâmpinăm ierarhii sociale la același rang de importanță cu inegalitățile sociale, iar din perspectiva lui Bourdieu, ele sunt menținute mai puțin de o forță fizică și mai mult de forme ale dominației simbolice. Dacă luăm în considerare analiza marelui sociolog, violența simbolică se distinge prin două caracteristici înlănțuite: este mai puțin recunoscută de către clasa dominată și are o funcție de conservare a ordinii sociale. Fiind aproape imperceptibilă, Bourdieu consideră violența simbolică un instrument redutabil de represiune.

Revenind la climatul educativ familial, cercetările arată că elevii cu rezultate slabe trăiesc adesea într-un mediu tensionat, instabil, conflictual, unde apar cu perseverență dezacordurile între părinți cu privire la intervențiile educaționale și comportamente de culpabilizare reciprocă. Dacă la divergențele de natură școlară se adaugă și lipsa de afecțiune dintre părinți, viciile, certurile, violența sau deprivarea materială, copiii își pierd încrederea în forțele proprii, sunt încercați de sentimente de inferioritate, vinovăție și nesiguranță, aspecte ce conduc invariabil la eșec. Educația depinde atât de mediu, cât și de ereditate; deși influența ei în dezvoltarea individului este incontestabilă, "nu poate totuși reechilibra o ereditate profund afectată și nici nu poate compensa un mediu deconcertat total - foamea, violența, durerea, mizeria" (Palicica, 2002, p. 27). Cu toate că multe dintre variabilele ce intră în sistemul de învățământ sunt controlabile (resurse și mijloace financiare, umane, materiale), schema de transformare de tip input-output concepută de către economistul Philip H. Coombs, deține și o componentă mai puțin observabilă precum echipamentul cultural al indivizilor angrenați în proces (norme, prejudecăți, comportamente, stereotipii).



**Fig. 1 - Schema relației funcționale dintre sistemul de învățământ și procesul de învățământ – adaptare după Philip H. Coombs**

Sursă: Coombs, P., H., 1968, p. 24

Sistemul reprezintă un conglomerat de elemente care acționează unul asupra celuilalt, generând un întreg cu grad de complexitate superior față de suma elementelor din care se compune, motiv pentru care finalitatea demersului educativ concentrează în sine tipul de personalitate solicitat, în condițiile unei perioade istorice de avânt transformațional.

Idealul educativ în societatea democratică românească, ia forma unui ”om conceput ca personalitate complexă, integrală, armonioasă, cu un evantai de calități intelectuale, morale, profesionale, estetice, fizice și care să se adapteze cu ușurință la schimbările cerute de progresul social, științific, tehnic, cultural, contemporan” (Palicica, 2002, p. 55), însă se impune să avem în vedere că dezvoltarea personalității umane nu poate fi concepută în afara unei ambianței culturale de referință, căreia individul îi aparține. Un mediu familial defavorizant, ce reclamă necesitatea unor strategii de intervenție personalizate și compensatorii, nu condamnă la insucces și inadaptare toți copiii ce provin din aceste medii, după cum nici apartenența la un climat elitist nu garantează reușita școlară.

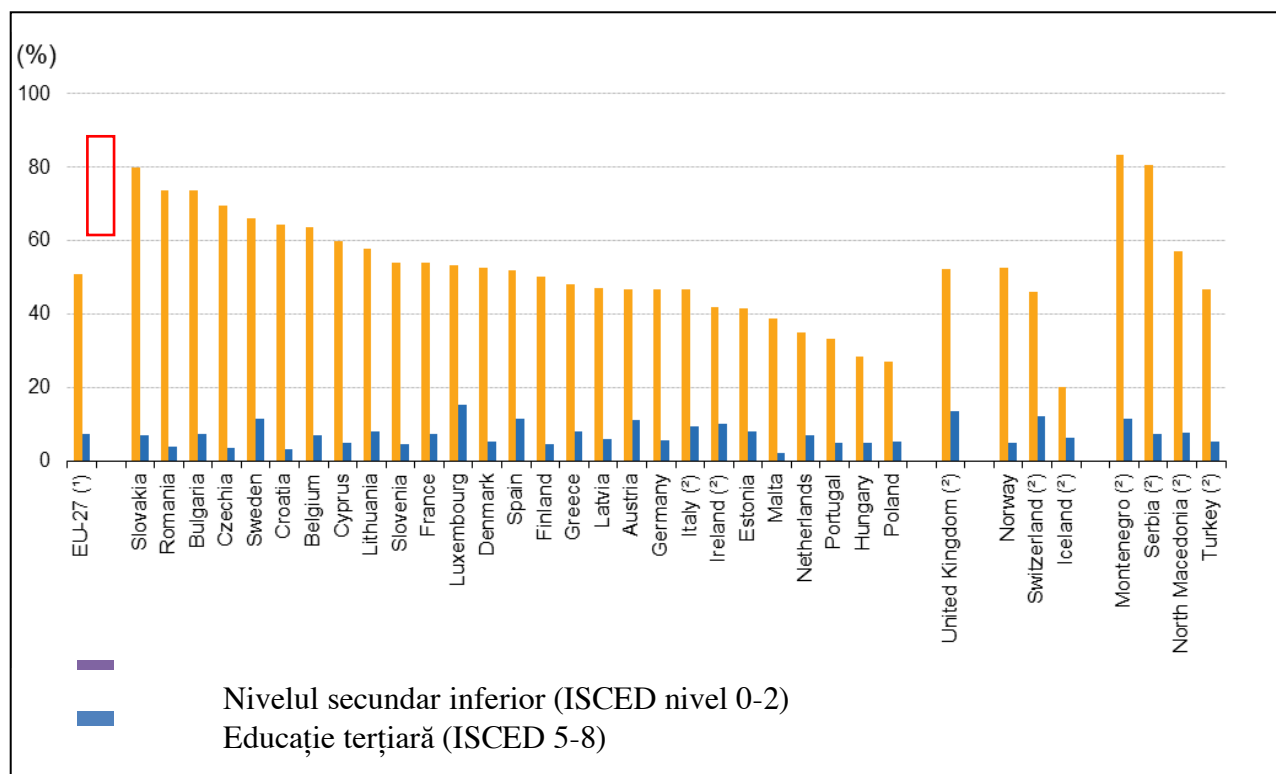
### **Ereditatea handicapului socio-cultural**

Se discută tot mai frecvent despre sustenabilitatea investițiilor în formarea copilului pentru a face față obstacolelor diverse, ca măsură de reechilibrare socială. Conceptul de dezvoltare sustenabilă a fost introdus pentru prima dată în anul 1987, de către Comisia Mondială pentru Mediu și Dezvoltare. Raportul Brundtland, intitulat ”Viitorul nostru comun”, a reprezentat una dintre primele tentative notabile de reconciliere a progresului economic cu echilibrul social și protecția mediului înconjurător. Mai târziu, a apărut ”un plan de acțiune pentru oameni, planetă și prosperitate” (ONU, 2015, p. 5) în cadrul căruia educația reprezintă un obiectiv de sine stătător – SDG4, obiectiv de dezvoltare sustenabilă menit să promoveze valori precum incluziunea, echitatea, coeziunea socială și învățarea pe tot parcursul vieții. O subdiviziune a SDG4 este însăși alfabetizarea - Target 4.6, care urcă dincolo de simpla dihotomie *alfabetizat* - *analfabet*. Exprimarea, indiferent de formă, este critică pentru supraviețuirea și interacțiunea umană prin dualitatea rolului - ”mediator pentru instruire, precum și conținut pentru învățare” (Ikonta, 2021, p. 5).

În timp ce politicile publice și programele de dezvoltare aduc în prim plan necesitatea investițiilor în educație și alte servicii conexe, accentul trebuie mutat pe factorii intrinseci care determină cererea pentru aceste servicii. Educația influențează, în mod invariabil, componenta profesională pe care o persoană o poate accesa, iar riscul de sărăcie crește odată cu scăderea nivelului de educație prezent în familia convențională. Uniunea Europeană a înregistrat în 2019

un procent de peste 50.8% (EUROSTAT, 2020) reprezentând copii ai căror părinți au atins un nivel maxim de școlarizare aferent nivelului ISCED 0-2 și care sunt predispuși riscului de sărăcie prin prisma educației din climatul familial. Atunci când se evaluează impactul cultural al mediului de proveniență asupra riscului de eșec asignat copilului, România se edifică cu o rată de peste 70%, fiind depășită doar de Slovacia (EUROSTAT, 2020).

**Tabel 1. Rata copiilor cu vârsta < 18 ani aflați în risc de sărăcie, analizată din perspectiva celui mai înalt nivel de educație obținut de către părinții lor, EU-27, 2019**

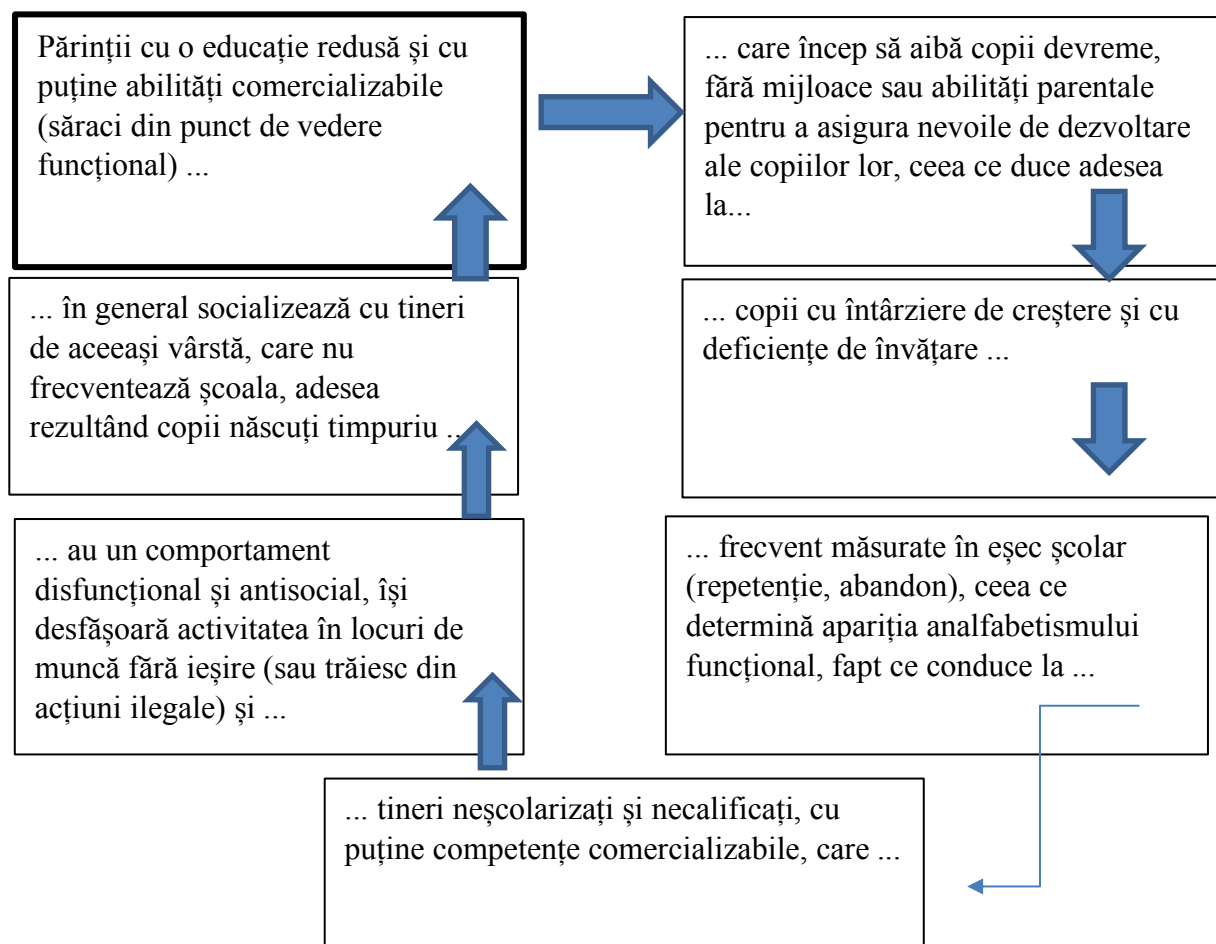


Sursă: Adaptare după EUROSTAT, *Children at risk of poverty or social exclusion*, 2020

Familia, ca spațiu de debut al educației emergente, a început să fie studiată în corelație cu transferul intergenerațional al sărăciei – ITP (Intergenerational Transmission of Poverty). O perspectivă simplificată a acestui model, descrie tabloul comportamental al părinților care încep să aibă copii prea devreme, nu dețin mijloacele și resursele necesare pentru a investi în educația acestora – copiii nu au acces la școlarizare și prin urmare nu dispun de competențe comercializabile – în general aceștia se vor identifica cu tineri aparținând unei clase inferioare și – vor duce mai departe ereditatea handicapului sociocultural.

Educația și veniturile insuficiente ale părinților limitează resursele pe care le pot obține cu scopul de a le transfera copiilor sub formă de îngrijire medicală, alimentație echilibrată, dar se manifestă și prin capacități reduse sau inexistente de a le oferi un cadru cultural adecvat vârstei.

În mijlocul unor medii sociale, economice și culturale de obicei dure, cu servicii sociale inadecvate, piețe ale forței de muncă suprasolicitate pentru cei necalificați, oportunități culturale reduse și modele de succes, o serie de impedimente formidabile care caracterizează mediul familiilor sărace includ:



**Tabel 2. O perspectivă simplificată a Transferului Intergenerațional al Sărăciei (ITP)**

Sursă: ADAPTARE după Morán, R., în *Escaping the poverty trap. Investing in children in Latin America*, Cap. 1 – Intergenerational Transmission of Poverty, 2003, p. 9

Graficul ilustrează ”ipotezele ITP privind fluxurile cauzale și natura ciclică a procesului” (Morán, 2003, p. 8) și mai mult, oferă un cadru exemplificat pentru facilitarea indentificării momentului și a locului în care se poate interveni cu acțiuni pragmatice de întrerupere a lanțului. Este important de menționat că modelul moránist se aplică doar acelor indivizi născuți în procesul ITP și care, dacă nu sunt sprijiniți pentru a se detașa de precondițiile inerente, ar completa ciclul și l-ar reseta pentru generațiile următoare.

Cu toate că perspectiva se concentrează asupra dinamicii interne, merită subliniat faptul că această perspectivă nu condamnă persoanele dezavantajate pentru situația în care se află, ci amintește despre influențele externe (servicii sociale, politici publice, strategii guvernamentale, oportunitățile de dezvoltare) care configurează un mediu ostil pentru progres. Dacă recunoaștem la scară largă că aceste impedimente există și aprobăm literatura de specialitate care pledează pentru echilibrarea condițiilor de viață, modelul ITP poate fi utilizat ca instrument euristic, concentrat pe factorii pur endogeni familiilor sărace.

## Concluzii

Fie că se ia în considerare venitul monetar sau nivelul de cunoaștere al părinților, văzute prin optica potențialului de câștig și a capacității de creștere a copiilor, literatura de specialitate (Carneiro *et al.*, 2021) evidențiază faptul că educația timpurie este maximizată atunci când în familie se înregistrează un flux echilibrat de investiții în dezvoltarea copilului.

În comunitățile profund marcate de inegalitate, cu niveluri ridicate de sărăcie, intervențiile efectuate în beneficiul copiilor reprezintă măsuri avantajoase atât pentru echitatea socială, cât și pentru eficiența economică. Scopul acestor măsuri este de a oferi oportunitatea tuturor copiilor de a intra într-un joc cu șanse egale de câștig, tradusă prin abilități și competențe adecvate pentru o competiție onestă. Transmiterea intergenerațională a sărăciei de la părinți la copii ”erodează coeziunea socială și alimentează violența și dezordinea civilă” (Morán, 2003, p. 2), anulează în tot sau în parte egalitatea de șanse încă de la naștere și afectează pe termen lung productivitatea globală prin perpetuarea unei clase inferioare de gospodării fără acces la dezvoltare.

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# THE IMPORTANCE OF PSYCHOMOTOR DEVELOPMENT IN THE FORMING OF WRITING SKILLS IN CHILDREN WITH MILD AND MODERATE INTELLECTUAL DISABILITIES

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**Abstract:** *Psychomotricity is the interrelationship between psychic and motor with effects on the overall development of the child with intellectual disability. At a young school age, the child with an intellectual disability learns the graphic signs, forms writing skills, mathematical calculations, continuously adapts to the school environment by requiring intellectual and adaptive functions. In all school activities there are involved components of psychomotricity: knowledge of the body scheme, fixation/ establishment of left or right laterality, increased attention for senestrality due to the position during writing, spatial-temporal organization, oculomotor and motor coordination. The presence at this level of psychomotricity disorders negatively influences the formation of writing skills. The purpose of this study is to identify theoretical and practical aspects in the literature regarding the link between psychomotor development and writing in the context of mild and moderate intellectual disability.*

**Keywords:** psychomotricity, intellectual disability, writing skills.

## **Introduction**

Entering the school, learning basic rules of social conduct in the school environment, communication with the group, requires a constant adaptation of the child to the requirements. Learning the new skills to use writing tools is an intellectual and psychomotor challenge of the child with intellectual disability. If we look at the phenomenon of writing from an ontogenetic perspective, we can say that we prepare for this activity from the very first months of life. The child reaches out to grab a toy, throws objects in the vicinity while watching it with wonder, therefore developing the perception of the permanence of objects in space, eye-hand coordination, fine hand muscles. What we mean is that acquiring the written language is a lengthy process that begins very early and takes shape specifically during the period of early schooling.

In this study we want to highlight the link between disability, the psychomotor development according to the chronological age and the formation of writing skills in children with mild and moderate intellectual disability. We will answer the following questions:

- What is intellectual disability?
- What is psychomotricity?
- What is the connection between the level of severity of intellectual disability and the delay in the development of psychomotricity?



- How does the presence of intellectual disability and psychomotricity disorders influence the formation of writing skills?

### **Literature review**

Psychomotricity is a complex activity involving motor function and psychic processes (Jay & Owen, 2016). In the motor actions are involved perceptual and intellectual functions, the perception of information and the adequate execution of the act of response (Arcan & Ciumăgeanu, 1980) between the two functions are installed coordinations with important developments. Motor activities are regulated by psychic processes, are under the monitoring of mechanisms of self-regulation and behavioral control.

Radu & Ulici (2003, p.8) define psychomotricity as "a complex act, which conjugates the motor and psychic forces in the realization of the action, in which the perceptual, sensory and even intellectual functions are involved." Epuran (2011) emphasizes the connection between perception as a cognitive process and movement. Cognitive, affective processes and motor acts mentally regulate the motor activity of the individual, motor function being one of the functions that ensure the adaptation of the body to daily needs. "Human motor function is the expression of life whose mechanisms are in the body-psyche-environment relationship." – Socrates (Epuran, 2011, p. 20). The physical development of the child must be viewed in close connection with the development of mental processes (cognitive, affective, volitional) and of the personality as a whole (Ababei, 2006). Horghidan (2000) associates the notion of knowledge to motricity as a result of the evolution and physical maturation of the young child. The movement of the child in the environment, the continuous adaptation to it leads to the formation of personal autonomy, the establishment of the child's social relations in the first years of life being reflected in his/her play (the precision of movements, the manipulation of objects, etc.). Language development requires the development of physical (development of the phono-articulator apparatus, fine muscles of the hands, eye-hand coordination) and functional development of the child.

In the literature there are several classifications, depending on the author, of the components of psychomotricity that capture essentially the same elements. According to Bănică (2011) the elements of psychomotricity are: body scheme, laterality, ideomotricity, motor intelligence, praxia and motor coordination. Epuran (2011) gives us the following classification: body scheme; dynamic, segmental and general coordination; static/balancing coordination; perceptual-motor coordination; rapidity of movements; ideomotricity. Arcan (1980) describes the following components of psychomotricity: body scheme, dynamic coordination, laterality, static coordination, balancing, perceptive motor coordination, rapidity and ideomotricity. Picq and Vayer (in Albu et al., 2006, p. 16) systematized the elements of psychomotricity into three large groups of activities represented by: basic motor conducts, neuromotor behaviors, conducts and perceptive-motor structures.

### **Intellectual disability**

According to DSM 5 (2016) intellectual disability is included among neurodevelopmental disorders. Disability occurs during the period of development of the child (until the age of 18) before the child's school age. It is characterized by deficits in general mental abilities (reasoning, problem solving, abstract thinking, school learning, learning from experience). This impairment of development produces a deficit on the social, school and occupational personal level and of the adaptive function of the individual (DSM 5, 2016).

Intellectual disability must meet three criteria:

A. deficits of intellectual functions;

B. shortages of adaptive functioning;

C. the onset of adaptive and intellectual deficits must be in the period of development (DSM5, 2016).

According to the DSM 5 (2016, p. 33) the level of severity of intellectual disability can be established considering the "adaptive function of the child compared to the norms of the same age group" (Roşan & Bălaş-Baconschi, 2015, p. 99). The child is evaluated on the areas: conceptual, social, practical. The conceptual field refers to the acquisition of language, knowledge/skills of reading-writing-communication, oral message, psychic processes (memory, thinking, planning). The social field refers to the friendship relations that the child establishes, interpersonal communication, empathy. The practical field in which self-service skills, personal autonomy, organization of school and professional activities, knowledge of money and their management are included (DSM 5, 2016).

The severity levels of intellectual disability can be: mild, moderate, serious, deep. It is established after a complex assessment of the development level of the intellectual and adaptive functions, of the way in which the child copes in the environment and adapts to changes.

### **Psychomotor disorders in the context of intellectual disability**

In children with intellectual disability, the sensory-perceptual function is affected, producing a cascading effect, low sensitivity to stimuli affects the perception and then the formation of representations and the higher cognitive processes are affected to an even greater extent (Radu & Floşniţă, 2011). By affecting the sensitivity of the child's movement, the perception of movement and in this context, psychomotricity is also affected.

The perception mediated by action and the mental representation are poorly developed in the child with intellectual disability, which generates deficits in the spatio-temporal orientation. Delays on different motor levels, such as locomotion, can be an alarm signal of the child's development, thus there are certain gaps. The rhythm mode and level of appropriation of the body scheme can become a symptom indicating a significant delay in the psychomotor development of the child. Disorders of the body scheme occur in the child with intellectual disability, there is a delay in his/her development due to the slow pace of formation and evolution.

The perceptive motor structure of the child with intellectual disability is affected due to the close connection with intellectual development. When a retardation occurs in intellectual development, the specialist working with the child with intellectual disability must take into account in the intervention the slow development or the delay in development of the perceptive-motor structures (Arcan, 1980).

Cross-laterality, impossibility of specifying the preferred part for action, difficulties in differentiating the right side from the left side, the position of objects in relation to their own body and in space, writing difficulties (the meaning of writing / graphic act, the position of letters, inversions) affect the adaptation to the environment of the child with intellectual disability.

Radu and Ulici (2003, p. 15) identified the presence of the following disorders of psychomotricity in children with intellectual disability: accentuated disorders of organization, orientation and space-temporal structuring, inefficient coordination of movements in space, disturbances in the accuracy of movements, impossibility or difficulty of voluntary relaxation, increased difficulties of the motor functions of the upper limbs, bodily scheme disorders associated with orientation and structure disorders rare spatial, ambiguous laterality, disturbances of static and dynamic equilibrium.

The existence of a discrepancy on this level requires early intervention through psychomotor education and re-education activities. (Albu et al. 2006). The higher the degree of impairment due to disability, the higher the frequency of psychomotor disorders (Druțu, 2002). The more affected the intellectual functions and the adaptive function of the child, the stronger the psychomotor elements are affected, so at the time of execution may occur ineffective movements leading to the impossibility of performing the motor act (Radu & Ulici 2003).

The frequency of psychomotor disorders is about 1 to 6 per thousand of the general population. The additional or downward oscillation of this frequency can be influenced by transient causes, such as insufficient sensory stimulation, affective trauma, fatigue, alcohol abuse, coffee and drugs, poisoning. There are also lasting and permanent causes that lead to increased frequency of psychomotor disorders (Grosu, 2009). Studies conducted in 14 schools for children with special needs with intellectual disabilities in Romania show that 33.3% of the investigated population had psychomotor disorders (Verza, 2011).

### **Handwriting**

One of the common characteristics of the child with intellectual disability is the fragility of verbal conduct which is an impairment of oral and written language. The deficit in the sphere of language can be observed from the pre-preschool and preschool period of the child with intellectual disability through frequent delays in the manifestation of verbal language. In the school period the vocabulary is reduced to common words, lacking the expressiveness that the use of adjectives in the sentence give it, sentences are short and sometimes have no subject or predicate, the agreement between the noun and adjectives, subject and predicate is made harder requiring exercises, repetition.

The action of writing graphic signs, graphemes, syllables, words, sentences is very complex. It involves cognitive processes, the energy system of the small schoolboy, specific psychomotor development (development of the following components - oculo-motor coordination, knowledge of the body scheme, fixation of laterality and its knowledge, space-temporal orientation). Writing involves on the one hand the motor act of gripping the writing pencil/ utensil, eye-hand coordination, perceptual-motor structures of space-temporal orientation, laterality, body scheme and on the other hand cognitive, volitional, attitudinal, affective processes. The graphic act is a complex activity that requires the entire being of the child. It is necessary to know the body scheme in order to have control over the environment and one's own body a good oculo-motor coordination through "the dissociation of the movement of hands and fingers, of the motor motor of the eyes" (Ababei, 2006, p. 19).

The difficulties encountered by the young schoolchild with intellectual disability in acquiring reading-writing skills are also given by the specifics of cognitive processes, memory, attention. By analyzing the memory process of the child with intellectual disability, we know that the entire process of coding, storing and updating information is carried out with difficulty. The long-term memory of children with intellectual disability is affected, with delays in his/her development. The imprint of this deficit is placed on the formation of the writing skill. To fix the information in the long-term memory we will use several senses: visual, tactile-kinesthetic (drawing in sand / cornmeal flour... of graphemics), auditory (the use of a melodic line). Working memory is reduced, the child operates with few constructs / notions at the same time (Aghena, 2017). In order to write in the notebook, the child with intellectual disability must orient himself/herself in the writing space (one-page, lined space, squares), from top to bottom, from left to right, to be able to appreciate the sizes (large, small), the identification of positions vertically, horizontally, obliquely. Learning to read-write is done at their own pace, taking into

account the individual peculiarities of the young schoolchild, during the 5 years of study (classes 0-IV) and starting from the first grade, children learn the writing of graphemes guided by the teacher / psycho-pedagogue. The teacher uses the curricular documents and follows the suggestions from the curriculum of the discipline Reading-writing-communication (O.M.E.N 3702/ 21.04.2021), considers the rhythm at which the child will know how to write and recognize the letters, to integrate them into syllables and then into words establishing links between them. For children who have a slower pace of psychomotor and intellectual development, this process of acquiring writing-reading can be prolonged even in the secondary school.

By analyzing the curriculum in the discipline Of Reading-Writing-Communication grades I-IV, mild, moderate intellectual disability, we notice that there are included activities aimed at the development of psychomotricity as pre-requisites of writing. The first grade is aimed at preparing students for writing, the formation of writing skills through learning activities aimed at the development of psychomotricity (the development of fine muscles of the hands, the motor coordination of the hands, the precision of the hand movement, the correct grip of the pencil, the oculo-motor coordination, the posture and static balance from the sitting position during writing and the perceive motor structures) and the development of phonemic hearing. In the second grade based on the previously acquired competences to make a consolidation of the writing skill and compared to the first grade, the child will be encouraged to self-correct (letters, syllables, written words) comparing with the given model. The suggested notebooks for use in classes I to II are type I or large square. In the third grade, the exercises aimed at the development of psychomotricity continue and they aim at forming the competence to arrange in the page and on graphic spaces of the title, paragraph, free spaces, distance between words.

The learning activities will aim at: the correct posture during writing, the development of fine motor skills and precision of graphic movements, the orientation on the page (up/down, left/right), the framing in the page space following the proportion between letters and the space between words, the correct writing of words, sentences, texts on the sheet Type I, Type II, dictando respecting the classification on the page according to the type of notebooks line. In the fourth grade we talk about the consolidation of writing skills, by correctly placing on the page and on graphic spaces. At this level, it is considered that the correct, legible writing skill has been formed, properly framed in the writing space, making the transition to the dictando notebooks.

Whether or not the writing skill is acquired, it is influenced by the levels of severity of intellectual disability. In the execution part of the graphic act instrumental learning is involved, aiming at the formation of reading-writing skills and psychomotor learning "based on the conscious appropriation of motor schemes and involving: body scheme, orientation, coordination, speed, rhythm" (Verza, 2011, p. 41).

## **Conclusion**

At the young school age, the child with intellectual disability learns the graphic signs, forms his writing skills, mathematical calculation, continuously adapts to the school environment by demanding intellectual and adaptive functions. In all school activities there are involved components of psychomotricity: knowledge of the body scheme, fixation / establishment of left or right laterality, increased attention to senestrality due to position during writing, spatial-temporal organization, oculomotor coordination, motor coordination.

The writing of letters is influenced in a negative sense by the disorders of the spatial organization, the letters being written unevenly (one smaller, the next larger), some exceed the

writing space or are so small that they cannot be read. Disorders of laterality and body scheme lead to inversions of letters in the word, mirror writing. Poor oculo-motor coordination and debility of fine motor function affect the correct execution of the grapheme, which is rounded or sharp.

The psycho-pedagogical intervention is necessary in the field of psychomotricity as an integral part of the school adaptation of the child with intellectual disability, in order to create favorable premises for the development of the written language and the child's adaptation to the environment, of his/her professional training in order to become an active, involved member of this society.

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# PERSPECTIVES OF INCLUSIVE EDUCATION THROUGH THE USE OF SENSORY LEARNING TECHNIQUES AND METHODS

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**Abstract:** *The national strategy for children and young people with special needs is the basis of the idea of education for all and, at the same time, education for everyone. It should be borne in mind that not all children can cope sustainably with school requirements, but that, using the right methods of teaching - learning - assessment and respecting each child's own pace, students can make school progress, sometimes remarkable. Teachers involved in the education of children with special educational needs emphasize the development of activities that involve teamwork and cooperation, respect for the cultural identity of each child, monitoring the effectiveness of teaching - learning - assessment, support and school remediation. Support can be provided by addressing innovative methods for finding a solution for the development of an educational tool for the prevention, protection and reintegration of these students. Sensory education, based on experiences helped us to provide practical tools for school remediation, we help to cultivate among students with special educational needs values such as self-confidence, courage, initiative and lifelong learning.*

**Keywords:** learning difficulties, school remediation, innovative methods, sensory education

## Introduction

Learning difficulties are present in at least 10% of the population. So far there is no clear definition of the concept. Due to the multidisciplinary nature of the issue, there is or continues to be debate over how the concept is presented, with at least 12 definitions being considered. However, they have some things in common:

- Those with learning difficulties in problems with acquisitions and school progress. The discrepancies exist between the potential of some people to learn and what they actually learn.
- The one with learning difficulties presents an unequal development model (language development, physical development, school and / or perceptual development).
- Learning problems are not caused by environmental factors.
- Learning problems are not caused by mental retardation or emotional disorders.

The causes of learning disabilities are not yet known. However, some general remarks can be made:

- Some children develop and mature at a slower pace than others of the same age. Therefore, they may not be able to perform the required tasks at school. This type of learning disability is called developmental delay.
- Some children with normal sight and hearing may misinterpret everyday images and sounds due to unexplained nervous system disorders.
- Problems before birth or early childhood can negatively affect the child's subsequent ability to learn.
- Babies born prematurely and children who had medical problems shortly after birth may have learning disabilities.
- Learning problems can be genetically inherited.

## Methodology

The first definitions of learning difficulties belong to Kirk (1962). Thus, he appreciates: "A learning difficulty refers to a delay, a disorder, a slow development emotionally or behaviorally. However, it is not the result of mental retardation, sensory deficiencies or cultural and institutional factors" (Kirk, 1962, p. 262). In another definition, Kirk says, "I used the term learning disabilities to describe a group of children with developmental, language and speech, reading, and communication skills." (in Learner, 1988, p. 128). Bateman (1965, p. 220) considers that individuals with learning difficulties are those who "have a significant discrepancy between their estimated intellectual potential and current level of performance, a discrepancy associated with basic learning disorders that may or may not be connected. with demonstrable dysfunctions of the central nervous system, but which are not the consequence of generalized mental retardation, cultural or educational deficiencies, severe emotional disturbances or sensory deficiencies".

Traian Vrașmaș (2001) distinguishes between the phrase "learning difficulties" in the narrow sense and "learning difficulties" in the broad sense. In the initial and narrow sense, the phrase refers to disorders with psychomotor, psycho-affective dominance - without significant deviations of behavior - to the slow pace of learning and / or liminal intellect, to instrumental disorders.

According to the definition given by AQETA (l'Association Québécoise des disorders d'apprentissage), adopted in March 2002, the expression "learning difficulties" refers to a number of dysfunctions that may affect the acquisition, organization, retention / storage, understanding and treatment / processing of verbal or nonverbal information / messages. These dysfunctions affect the learning of people, who, in fact, can demonstrate essential intellectual skills in thinking or reasoning. As such, learning difficulties are different from intellectual disabilities.

Based on the above definitions and assessments, we can conclude that the expression "learning difficulties", in a broad sense, generally refers to all obstacles and deviations in learning, in particular, that intervene in the development of the personality of the individual involved in the continuous process. Training and learning disabilities are more common in boys than in girls, possibly because boys tend to mature more slowly. Some learning difficulties seem to be related to problems with spelling, pronunciation or language structure.

Children with learning disabilities have a wide range of symptoms. These include problems with reading, math, comprehension, writing, speaking or cognitive skills. Hyperactivity, lack of concentration and coordination of attention can also be associated with learning disabilities, but they are not actual learning disabilities. The main feature of the learning disability is a significant difference between the child's acquisition in some areas and his intelligence as a whole.

Learning disabilities usually affect five general areas (Prelock & al., 2008):

- Speech: delays, disturbances, and deviations from listening and speaking.
- Writing: difficulty reading, writing and spelling.
- Arithmetic: difficulties in performing arithmetic operations or in understanding basic concepts.
- Cognition: difficulties in organizing and integrating thoughts.
- Memory: difficulty remembering information and instructions.

All of this is complemented by motivation, emotional feelings and attitude towards learning. If we understand the learning process of the student with special educational needs, we can easily choose the teaching strategies to use in the teaching-learning-assessment process. In order to put into practice the optimal strategies, we must first offer an adapted curriculum, ie

to select the contents, methods, learning-teaching-assessment technique, depending on the child's potential. Thus, from the general curriculum are selected only those contents that can be understood by the student with special educational needs. These contents need to be simplified so that they are at the student's level of understanding. When we implement didactic strategies for the adapted curriculum, we will use the concrete in the teaching-learning process, we will repeat the taught material until we consider that the student understood the message, we will educate the attention, we will remove the external factors that could distract. Stimulating the student through verbal rewards, positive feedback, attractive work environment, diversity of methods and techniques contribute to the success of teaching.

These didactic approaches lead to a cognitive progress centered on the discovery of the other, of an active and interactive participation, to the common reflection within the educational communication of which it is part. The interactivity of teaching promotes the interaction between the minds of the participants, between their personalities, which leads to an optimal engagement of thinking, to an awareness of learning. Cognitive stimulation involves a structuring of external stimuli according to different levels and types of mental organization (Baars, Gage, 2010).

The content area of the cognitive stimulation mode and knowledge activities includes:

- Stimulation of sensory cognitive processes (visual, gustatory, olfactory, tactile, auditory);
- Formation of visual and perceptual skills (oculo-motor and oculo-manual coordination, form-background perception, constancy of perception, spatial and temporal relationships, etc.);
- Learning fundamental learning concepts (associations, groups, relationships between concepts, numerical order, perception / association of sounds and letters, etc.);
- Perceptual, sensory and motor exercises that lead to the formation and development of mental processes such as mental representations, memory, attention, thinking style, imagination, creativity, etc .;
- Training and development activities of psycho-motor components.

## **Conclusion**

For these content areas to have an efficient level of functioning, we need to stimulate working memory, long-term memory and PFC-the prefrontal cortex-where the processes of control, selection, monitoring and maintenance of information take place (Oliver, 2011, p.211-235). All this is based on the adoption of simple but effective methods of stimulating learning, especially of students with special educational needs:

- General health, rest and nutrition are essential in the development of learning ability.
- Reducing / avoiding procrastination through breaks and routines helps to reduce anxiety and increase the ability to concentrate.
- The use of mental maps and visual impact diagrams helps to fix information and the kinesthetic one develops through writing and drawing.
- Assigning emotional states to information more difficult to remember, thus facilitating the ability to recall. Transforming passive learning into active learning by telling the information read is an effective method of stimulating cognition.
- Planning the volume of learning to the detriment of multitasking. The sudden transition from one task to another prevents the development of attention to execution.
- Periodic testing of the learned material. The comfort level must be associated with the test method. The information must be associated with the evaluation method.

Through proper exercise and guidance, the mentor teacher of the student with special educational needs can help him to learn in a pleasant and simple way - to learn while playing,



to be flexible and to have the ability to self-regulate the brain. The child must be helped to learn effectively, not hard.

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# VIOLENCE BETWEEN CHILDREN IN SCHOOLS: BULLYING

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**Abstract:** *Benjamin Disraeli said that “Courage is fire, and bullying is smoke”. When we hear the word "violence" or "aggression", the first thing we think of is physical violence, physical pain, but violence has a broader meaning. It is violence when we use an ironic word, it is violence when we ignore a person or when we obey because we are afraid. Violence is much subtler, much deeper. Bullying among children is a very well-known phenomenon these days all over the world, however it still needs to study it in more depth, to understand it and to find the best way to make a change. The first studies on bullying started in the '70s in Norway by Dr. Dan Olweus, soon to be followed by other researchers from different countries as well. In Romania, although according to the Law on National Education, no. 1/2011, psychological violence is prohibited, and Law 221/2019 on amending and supplementing the national education law establishes a series of measures aimed at bullying in spaces intended for education (schools, kindergartens), this phenomenon, according to studies, it still exists, moreover, it is growing. In order to a better understanding of this phenomenon in the Romanian schools, this paper aims to focus on raising awareness of the problem and keep looking for answers, concentrating on the children's point of view. The paper includes on one hand a literature review that explores the phenomenon, on the other hand a qualitative research (long-term observation data and semi-structured-open surveys) which main purpose was to identify the needs of the children on this issue. The findings of the paper were substantial, aggressors became more aggressive over the time, more inventive with more and more tools to “hurt” and the victims have more serious consequences, from depression, isolation to even suicide.*

**Key words:** school violence; bullying; aggressor; victim; prevention.

## Introduction

Looking at the news or the media, it can seem like the world is a more violent place now than it has ever been. Aggression is one of the most difficult social behavior to define. The meaning given differs depending on the approach and theoretical perspective adopted. Moreover, being aggressive depends on social and cultural norms. There are cultures or communities where violence is seen as natural, perhaps even necessary. But when it comes to children we think of purity and innocence. This should be far from them but the reality is different, and most often we find it in schools.

When considering all the rights violated when a child is bullied, one of the most important rights violated is the right to education. Education plays an essential role in the development of a balanced young person and by removing this basic right, the balance is disturbed. The first efforts to study this phenomenon of bullying were in Norway, where Dr. Dan Olweus, a professor at the Faculty of Psychology in Bergen, began research on bullying in 1970 (Olweus, 1993). One of the biggest benefits of this research was the transformation of the way in which educators, teachers, parents and even students perceive this phenomenon of bullying. In the past, it was seen as a natural way of growth, a part of human nature (Krige,

Pettipher, Squelch, Swart, 2000). According to a 2006 study, Alain Mouchoux states that "There has always been violence in schools.

Violence in schools is not a completely new social phenomenon. However, this phenomenon is more visible today, largely due to the media" (UNICEF Romania, 2016). In Romania, although according to the National Education Law 1/2011, psychological violence is prohibited, and Law 221/2019 amending and supplementing the National Education Law establishes a series of measures aimed at bullying in educational settings (schools, kindergartens), this phenomenon, according to the latest studies, still exists, and is even growing. The idea for this research came from the place where this phenomenon is most frequently seen, in schools. Because of the insults heard daily between children, the mockery and humiliation between them that often enter their daily and normal vocabulary, the present qualitative research wanted to deepen and to understand the phenomenon and bring answers to questions such as: To what extent is bullying/physical violence behavior manifested in schools? How do the effects of bullying/physical violence manifest themselves in the perpetrators and victims? To what extent are pupils helped by teachers/institutions? What would be appropriate ways to help those in such situations, from the students' point of view?

According to the study conducted by Save the Children Romania (2016), entitled "Bullying among children. Sociological study at national level", the impact of bullying on victims, reduces feelings of self-worth, isolates the child and can lead to depression or even suicide. The same study also points out that schools do not have a common approach in such cases, some teachers are more involved than others in preventing and stopping such conflicts, others remain passive. What is worse is that there are teachers who actually encourage bullying or bullies. As far as interventions are concerned, they only focus on the bully and the victim, there is no emphasis on the group of witnesses; parents often aggravate children's relationships and the intervention of school counsellors is minimal. The results of these studies should be a wake-up call to find more effective methods of intervention, with real involvement in the best interests of children.

## **Literature review**

School violence, whether we are talking about violence from teachers towards pupils, from pupils toward teachers or between pupils, is one of the most serious forms of educational disruption and development of children and young people.

Bullying in schools is worldwide, it is extremely complex with a multitude of forms, causes and specific aspects that have been the subject of many studies. According to a 2002 World Report on Violence and Health, a study on children's health in 27 countries, it showed that the majority of 13-year-olds were involved in bullying behavior at least once (Beldean-Galea, Jurcău, 2010, p.15).

School violence includes several types of violence: physical violence, corporal punishment, psychological violence including verbal violence, sexual violence including rape and harassment, bullying including cyberbullying and mobbing. The most vulnerable children and adolescents, including those who are poor or from outside ethnic, linguistic or minority, cultural, migrant or refugee communities, or who have disabilities, are at increased risk of school violence and harassment. Children and adolescents whose sexual orientation or gender expression does not is in line with traditional social expectations are also affected. School

violence and bullying can occur inside and outside the classroom, around schools, on the way to and from school, as well as online. In school, bullying often happens in places such as toilets, changing rooms, corridors and playgrounds where children and teenagers are less likely to be seen or supervised by teachers and other school staff (UNESCO, 2017).

Bullying among children is a very old phenomenon. The fact that some children are bullied frequently and systematically bullied and attacked by other children has been debated in the literature over the years. Although many have been and are familiar with this bully/victim phenomenon, it was not until the 1970s that started to study it more systematically. Dan Olweus was the first to raise the issue that this phenomenon of bullying in schools needs to be studied more carefully and systematically. Thus, Olweus (1999) establishes some clear criteria for defining bullying:

- (1) is an aggressive behavior or an action of doing harm intentionally;
- (2) it is behavior that is repeated over time;
- (3) interpersonal relationships are characterized by a power imbalance.

The aggressors share some common characteristics. These children usually have a dominant and impulsive personality, are irritable, get frustrated very easily, have difficulty following rules. There is also a tendency for bully boys to be stronger towards other boys and especially towards victims. Level of self-esteem is above average and they are also very sociable, they make friends easily (Beldean-Galea, 2016). It has been shown that bullies may have problems with alcohol and/or smoking, they can also have a positive attitude towards violence (Carney, Merrel, 2001).

Victims of bullying aggression fall into two categories: passive and active. Passive victims do not show any aggressive behavior towards their peers who assaulted them or towards others. They may have more diverse and serious mental health problems than those who are not involved in such behaviors (Kaltiala-Heino et al., 2000). Passive victims are usually cautious, sensitive children, shorter in stature, weaker than others, and more insecure (Olweus, 1993). Another category of victims is those who are active, they also become aggressors in turn, the aggressor-victims. If the victims do not adopt an assertive behavior, they become anxious with those around them and can retaliate (Palaghia, 2013). They present the weakest psycho-social functioning, representing a group with a particularly high risk, characterized by higher rates of behavioral problems, self-control and a low social competence, poorer functioning in the school environment compared to aggressors and passive victims (Haynie, Nanel, Eitel, 2001).

Bullying in schools is an important cause of public health problems among children and adolescents. A study by Weng, Chui and Liu (2017) suggested that victims have lower life satisfaction and perpetrators have more depression and anxiety than non-victims. In addition, victim-offenders experience the strongest depression, anxiety, and negative affect (e.g., distress, nervousness, guilt, and fear) and the lowest life satisfaction (Cho, Lee, 2018). Other studies show that students who are victims of bullying may suffer from post-traumatic stress disorder (PTSD). In a study examining the relationship between bullying and PTSD in high school students, Mynard et al. (2000) found that 37% of victims reported symptoms of PTSD. Furthermore, Rivers (2004) reported PTSD symptoms related to bullying in school, and approximately 25% reported being troubled by memories of bullying/aggression after leaving

school. Finally, a Canadian study reported a significant relationship between being bullied and PTSD symptoms among school children (Idsoe, Dyregrov, Idsoe, 2012).

A 2006 study conducted in Romania by UNICEF, entitled School Violence, sought to highlight the methods and resources of school institutions for initiating or participating in the prevention of violence in schools. The results showed that the school regulations are the basic document and used in terms of all the problems that appeared in the educational units. Some institutions have also developed specific regulations according to the needs of the school. The above-mentioned study showed that both principals and pupils state that the school uses in principle traditional means of information, without actively involving those directly involved in the debate on the content of regulations. In the same study, it is stated that the principal is the first person to whom students address for assistance and finding solutions, followed by parents or friends. School counselors are not consulted to a satisfactory extent in cases of violence, and the involvement of students in violence prevention depends on the perspective of the investigated actors, so it turned out that the percentage of principals who consider pupils involved in such acts of violence is over 85 %, while the students asked about this are 18%.

Many European countries do not provide or do not have enough information on legal requirements in schools to prevent violence and bullying in schools. States with such legal frameworks for school violence include Belgium, Finland, France, Germany, Ireland, Luxembourg, Sweden and the United Kingdom. These legal frameworks may suggest the involvement of the entire school or policy in dealing with violence and bullying. Such policies focus on action, assigning responsibilities and sanctions for non-compliance (Smith, 2004). Norway is the leading state in trying to help schools overcome and face the phenomenon of bullying (Sharp, Smith, 2002).

One of the main problems, as the children's reports suggest, is that many of the victims do not report the aggression to the teachers, and many of the aggressors say that no teacher has talked to them about such a thing. Although there are teachers who try to find out the bullying situations in their class, many of them do not know at all the existing situations and conflicts. One of the best solutions to prevent bullying would be for children to be included and asked directly about such situations and experiences. Of course, this direct interview requires increased trust and confidentiality, in order to be open to the person you are talking to (Sharp, Smith, 2002).

## **Methodology**

The issues addressed in the paper highlights the importance and need for awareness of the severity and extent of bullying and physical/mental violence between children in schools. Also, the purpose of the work and research was to identify the needs of children on this issue, identify a trusted way by pupils to help and find solutions to improve both the phenomenon and the caused effects. The main aim was set to include the views of both child victims and aggressors.

Given the vast complexity of the topic, general and specific objectives have been set for deepening and understanding the phenomenon from several points of view. As general objectives have been set to understand the phenomenon of bullying/physical-mental violence through the prism of victims and child aggressors and to identify appropriate ways to help, from the pupils' perspective. As specific objectives the research aimed to identify the typical behaviors of child aggressors, respectively of victims; to identify possible reasons for adopting

bullying behaviors; to analyze pupils' relationship with people in their environment and identify, find and analyze new methods to reduce the phenomenon in schools, in which students would trust and consider that would be helpful. The main research question that the paper answered is, how bullying/physical violence is manifested in aggressors and victims in schools?

In order to deepen the research topic and to understand better the implications, it was decided to use the qualitative research method, using a semi-structured interview and a long-term observation, 30 students of a primary and secondary school in Cluj-Napoca as target group.

In the initial phase, the observation was unstructured, without an observation guide, after which, understanding the importance and severity of the phenomenon, the observation continued in a semi-structured way, according to an observation guide. General thematic units were established according to the interests and objectives proposed to be observed, such as: students' relationship with those around them, conflicts, victim's behavior, aggressor's behavior, mode of action (the attack itself), effects, help requested/the help received and the intervention of the institution. The constant intervention with these students over several years, offered the chance for a long-term participatory observation (one year).

After the observation phase, questionnaires consisting of a semi-structured part and a small participatory/open part were applied, leaving the students to elaborate their answers in a freer way. This questionnaire was based on the main idea of finding out their personal experience regarding bullying, and of knowing the pupils wishes in what way they think they could be helped in these conflict situations and by whom.

The target population of the survey included 13 selected students, aged between 9 and 13 years old, from a school in Cluj-Napoca. These students were self-selected from the 30 observed participants. They have disorganized family situations, financial problems and a medium or low school situation.

## **Results and discussions**

The following will briefly present what was observed during this period of participatory observation, considering the main units found in the observation guide. From what was observed during the course of the study, friendships are formed and maintained according to certain similar principles/characteristics.

Children from the same social background, from the same area/neighborhood, with the same level of educational status form groups or friendships. Rarely do these groups or certain individuals in groups develop friendships with those in other groups. Instead they relate to each other, especially when there are certain common events, but they do not form friendships and the "little churches", as commonly called between pupils, are very well defined.

Another category observed was the lonely/ ignored/ invisible pupils. They communicate very little with others, they are always seen alone, they interact very hardly even with adults. As for the relationship of the pupils with the institution, and here we refer to teachers, professors, principle and so on, basically it stops after 4th grade. Up to this moment, teachers are involved in the welfare of students in their own class, try to avoid conflicts as much as possible, carry out activities and discussions in line with this topic, however, the sudden changes from primary to secondary school, are also observed on the behavioral level.

Pupils are less supervised, parent-teacher meetings are getting reduced, as is the interest in keeping the pupils together or in conducting classes with topics directed towards such issues. Students rarely turn to their teachers for help.

Among students, being different from others is not a source of pride but an obstacle to integration. Bullying directed at such people starts with children and teenagers finding common characteristics among themselves and excluding and ignoring those who differ in a certain way or are visibly more vulnerable. As examples observed, we can see in this situation the shy and quiet children, as well as the opposite of them, those who always have problems "the black sheep of the class", we can observe those who learn very much or who do not learn at all and have very low school performances, those who are differentiated by appearance, color, ethnicity, etc. Another thing observed were the children with difficult situations at home, financially or family, which it was known at school. One such concrete example would be the second grader whose alcoholic mother came to take him home and the other classmates shouted, referring to his mother as "the drunk, the drunk came". Children easily and spontaneously find reasons for mocking one or the other, and roles can often change.

As for the difference between boys and girls, the difference in bullying and physical/emotional violence is small, noting that girls resort more to emotional blackmail and boys to aggression. On the other hand, this difference observed is small, girls can and do resort to physical aggression, as for boys' emotional blackmail is less used and they prefer mean names, swearing, threats and physical violence.

The behavior of victims differs from person to person. It has been observed, however, that victims often internalize, do not ask for help, hide and very often find reasons not to go to school. As an example that demonstrates this, we can point to the situation where a 5th grader would hide under desks or in a locker to avoid being forced to come out at recess and be taunted and beaten by classmates for his big, wide ears.

The behavior of aggressors in turn is due to several causes. The most obvious ones are: due to the feeling and desire to belong to a group so they influence and turn against a third person; the desire for power and control over other peers by insulting fear; due to problems at home where they have no say and/or are abused or ignored and at school they externalize for the feeling of control and power; aggressive behavior problems caused by different reasons (e.g., home learned, ADHD). Aggressors usually act in groups and support each other. Bullies acting in a group against another person is called mobbing and is a more serious and dangerous form of bullying. Children gain more courage in these situations.

The effects on both victims and perpetrators can range from discomfort to negative effects with serious consequences. Mild situations have been observed where a second grader in a small group at break time told a classmate "go away from here we have a secret" and in the next break everything was forgotten and she was told the secret too, to situations where effects existed with consequences and emotional disturbances as an example: a fifth grade girl was constantly called "cow" by several classmates over a longer period of time and she cut her arms with a broken ruler.

It was also noted during this observation period that most perpetrators were themselves victims. The difference is that the stronger, confident ones retaliate, either towards those who have bullied them (and this often leads to physical violence, not bullying, bully-bully), or towards the weaker and vulnerable ones thus becoming bullies, and the vulnerable ones become

victims who hide and internalize (bully-victim). Long-lasting psychological and emotional effects can exist in both categories, only their manifestation and externalization differ. Depression, anxiety, lack of confidence, low self-esteem can exist in both victims and bullies, only that some will choose revenge, will continue aggressive behavior due to frustration and not knowing how to manage their emotions, and the weaker ones can sink into depression, loneliness, vices, even thoughts of suicide, showing these effects and studies conducted, according to Save the Children Romania (2016) in the sociological study entitled "Bullying among children".

Within a year, it has been observed that students do not turn to teachers for help after 5th grade. At recess teachers only intervene between children in situations of physical violence and in this case a report is made to both parties without listening to explanations (3 reports represent a low mark for behavior). In cases of emotional/verbal bullying, they rarely intervene, or if caught in the act by teachers, at worst they are verbally reprimanded.

Following the results of the participatory observation, open questionnaires were applied to 13 students, in order to find out, on the one hand, their involvement in bullying behaviors as aggressors or victims, and on the other hand, how the students see this phenomenon, how they think they could be helped and by whom.

The first part of the questionnaire revealed that all 13 students were both victims and perpetrators of conflict. The exception were two answers given by two girls who said they had not hit or bullied anyone but had both been victims of bullying once. The first part also showed us that there is a lack of trust between peers and a lack of empathy as out of the 13 students, nine answered that they often argue with their peers and ten feel that they are not understood by others. Safety in the school, from the answers given, is not a problem as all of them answered that they feel safe. On the other hand, six students go to school in fear because of being teased by their peers.

The second part of the questionnaire focused on the child seeking help and support if they were harmed in any way. This part was intended to find out who the child/adolescent trusts if someone harms their mental, emotional or physical state. Of the 13 students, to the question "if someone hurt you, what would you be more likely to do, 2 answered to defend themselves by doing something, 1 - to do nothing", 4 answered "to defend themselves by saying something", and the remaining six students "that they should tell someone and ask for help". Another important question that was included in the questionnaire was "why do they think some children don't ask for help when someone hurts them". The answers to this question were varied as they had the chance to choose multiple answers. Among the most popular answers were: "I think the person will find out; they are afraid; they are ashamed; they think they will be punished; they think nobody believes them anyway and I don't see the point because nothing will change anyway". These answers show that students find it difficult to find people they trust, they are also afraid of the consequences and do not believe they will be listened to in an objective way.

The next segment of the questionnaire was about children's views on who they think should be the person to help them in cases of violence or bullying. All the participating students consider that it is important, respectively very important that the person has to be patient and to keep confidentiality. It is also important and very important for students to be taken seriously and to believe in the children and what they say. When asked about the importance of involving



children and young people in decisions that affect them, most said it was important and two said it was somewhat important.

The thing that came across in the majority of responses from the descriptive part of the questionnaire, was about having someone by their side: “a person next to me to help me; to ask for help from people around me; to be a parent next to the child; to be a teacher to intervene”. Other relevant answers: “call the police and don't take the problem into their own hands because they risk more harm; have a friend by their side; don't let to be beaten up and cursed at; make amends; have someone in the school who doesn't take sides and listens to us; don't get punished, only the guilty”.

## Conclusions

This paper aimed to present some of the main results of a qualitative sociological research in a secondary school in Cluj-Napoca. It focused on the representative characteristics of the main actors involved in bullying, the aggressor and the victim and on these actors' point of view on the issue, to enhance the understanding of their needs and different factors associated with school bullying.

The research results indicate that students want objectivity, honesty and help. This was evident in observations but also in the last descriptive part of the questionnaire, where the children had the chance to write down and develop their ideas on what would best help children who are victims of violence and bullying.

Based on the research, teachers training would be important on this issue. Inappropriate teacher behavior and attitudes, which often ignore the situations in question or express their prejudices, create feelings of inferiority, insecurity and especially mistrust. Thus, isolated children will be even more isolated, feeling that no one and nothing can help them. Offenders are punished, sanctioned, and this often strengthens their ego, their confidence, they get used to it, and they will choose deviant behavior in the future.

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## SELF-ESTEEM STUDY IN JUNIOR PERFORMANCE SKIERS

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**Abstract:** *The present study analyses, based on personality assessment questionnaires, the characteristic of self-esteem of the athletes of the two targeted clubs (CSS Baia Sprie, respectively CS Alpina Baia Mare). The pilot study conducted from October 2018 to April 2019, was conducted based on two theoretical models (Rosenberg & Rosenberg, 1978) respectively (Owens, 1993), and targets the three defining factors of self-esteem. Starting from our results, implications of the relationship between the self-esteem, self-depreciation, infatuation are debated.*

**Keywords:** performance, motivation, sports, self - esteem, self- depreciation.

### Introduction

Alpine skiing practiced continuously and systematically by young people increases the mass base of the selection for performance sports. Young people, only by improving the quality of the training process, within thousands of hours of training, using the most varied means to lead to raising the competitive level, by ensuring an adequate competitive program, can achieve outstanding performance. As in all other sports, in alpine skiing you can not reach the highest step of the award podium, without a diligent training without a continuous psychological training that means countless hours of work.

Self-esteem is the evaluative component of the self and refers to the emotional experience, the emotions that the person experiences when he refers to his own person (Constantin, 2004). Self-esteem is an assessment we make of ourselves that can take many forms (global or multidimensional, state or disposition, personal or collective). For example, Rosenberg (1979) distinguishes between high self-esteem (positive) and low self-esteem (negative). Lutanen and Crocker, in 1992, speak of personal self-esteem, with reference to the subjective evaluation of one's own attributes, specific to the individual, and collective self-esteem, with reference to value judgments on the characteristics of the group or groups with which the person identifies.

Starting with Rosenberg's "Scale of Self-Esteem," Heatherton and Polivy build in 1991 a tool to measure general or "trait" self-esteem and self-esteem as "state" or momentary. Most psychologists define self-esteem as the overall assessment of self-worth as a person. It is about the assessment that a person makes about its own value, in other words, on the degree of satisfaction with one's own person (Harter, 1998). Self-esteem can also be defined as the

affective tone of the representation of the concept of self (Tap, 1998). Rosenberg (1979) defines self-esteem as a complex cognitive and affective synthesis. He believes that self-esteem dictates attitude more or less good of the individual than his own person. Baumeister (1998) defines self-esteem using synonymous terms such as: pride, selfishness, arrogance, narcissism, a kind of superiority. According to W. James (1998), self-esteem is the result of the relationship between the success of some actions and the aspirations of the individual regarding the undertaking of that action. " If we reduce the aspirations to zero we will have the universe at our feet. A person will have a high self-esteem insofar as his successes are equal to or superior to aspirations. Conversely, if aspirations exceed success, self-esteem will be low. Self-assessment is guided by social and linguistic interactions with others, starting in childhood. Those around represent a social mirror care in which the person he looks to get an idea of what others think of him. This opinion, once found, will be quickly incorporated into his self-perception. Our self-esteem increases as those around us have the best possible opinion of us. And vice versa, if the others do not have an opinion how much better about us, we will integrate their negative opinion and we will develop a low self-esteem. A person with a balanced self-esteem will have a stable way of thinking about himself and will not risk being destabilized by approval or criticism.

There are many studies that show that most individuals try to maintain a good self-image. Reviewing such studies, D. Martinot (apud M. Bolognini and Y. Preteur, 1998) emphasizes that we tend to maintain a positive global impression of ourselves, a positive self-esteem. When we do this we are not completely objective, we tend to appreciate that we are more responsible for our successes than for our failures and we compare ourselves to others using the dimensions for which we are advantaged, for which we feel competent. Subjects with low self-esteem accept a negative reinforcement much more easily and a positive reinforcement more difficult, compared to subjects with a strong self-esteem. Individuals with low self-esteem are better able to explain negative events by invoking internal causes and feel more responsible for their failure compared to their high-self-esteem counterparts. In addition, individuals with low self-esteem are less willing to take risks than other subjects, probably out of a need to protect themselves from the threat, as they have few self-protection resources. By comparison, individuals with high self-esteem have rich and easily accessible self-protective resources and will therefore be much easier to deal with a threat (Constantin, 2004). The stability or instability of the affective component of the self depends on the certainty that individuals have. about what they are. In other words, the stronger this component (positive self-esteem), the more stable and insensitive it is to situational variations; the less strong this component (negative self-esteem), the more unstable and therefore more sensitive to situational characteristics.

In this research, the pilot study conducted from October 2018 to April 2019 were applied personality assessment questionnaires characteristic of the self-esteem of athletes of the two targeted clubs (CSS Baia Sprie, respectively CS Alpina Baia Mare based on two theoretical models (Rosenberg & Rosenberg, 1978) respectively (Owens, 1993). Given that the three components of physical performance, motivation, nutrition and psychological state of the athlete are interdependent, we want to find out how self-esteem tends to provide predominantly positive answers even if in some situations certain negative correlations are observable. slightly significant, they indicate trends rather than definite links in ski performance.

The pilot study conducted from October 2018 to April 2019 was conducted based on two theoretical models (Rosenberg & Rosenberg, 1978) and (Owens, 1993) integrates three defining factors of self-esteem, as follows:

Self-esteem (normal) defines an absolutely normal person, a person who self-evaluates closer to one or the other of the two poles: low self-esteem; high self-esteem. Low scores indicate modest, restrained, hesitant and cautious characters, who do not take risks to rise above others,

and high scores indicate positive characters, with high self-expectations, who take risks and seek to overcome limits.

Self-depreciation defines people with low self-esteem, who consider themselves limited, self-defined as a burden to themselves and others. These people expect little from themselves, see themselves as victims and feel sorry for themselves. Most of the time they show chronic states of anxiety with too much emotional turmoil, unable to accept compliments and permanently excusable for what they do.

Infatuation characterizes people opposed to those with highly self-deprecating characters, with a high self-esteem, sometimes taken to the extreme. People in this category feel special, out of the ordinary, very pretentious in their relationships with others, lacking compassion for the suffering of others. Due to the desire to excel in everything I do, I avoid situations in which I know I can't succeed, out of the desire to avoid the humiliation of a failure.

Based on the premise that psychological improvements, in addition to the training in force, will help increase sports performance in junior skiers aged 11-17, we set out to analyze whether exercises to improve psychological aspects are able to improve performance in skiing in athletes up to 17 years. Therefore, our hypothesis assumes that the implementation of a special intervention program in the professional training of athletes results in an increase in sports performance, as well as in the improvement of psychological aspects.

### Research Methods:

Experimental research that took place over a period of 6 months and consisted of carrying out the intervention program, initial and final measurements of physical tests and application of psychological questionnaires, monitoring of training in compliance with the requirements of the intervention plan, monitoring physical or moral changes and reactions alongside the athletes, collecting and interpreting data, formulating conclusions. The experimental group, composed of 17 junior athletes from C.S.S. Baia Sprie and the control group composed of 17 junior athletes from C.S. Alpina Baia Mare took place over a period of 6 months, October 2018 until April 2019, wanting to stand out based on personality assessment questionnaires, the characteristic of self-esteem of athletes of the two clubs concerned, based on of two theoretical models (Rosenberg & Rosenberg, 1978) respectively (Owens, 1993) integrating the three defining factors of self-esteem. The questionnaire focused on these factors was applied to groups of subjects from the two sports clubs and to analyze the concurrent validity of the questionnaire. A first step of the analysis was that of the correlations between the three factors presented above.

*Table 1. Correlations to the CSS Baia Sprie group, 2018*

		A.BS.2018	I.BS.2018	SN.BS.2018
A.BS.2018	Pearson Correlation 1		-.735*	-.516
I.BS.2018	Pearson Correlation -.735*		1	.614
SN.BS.2018	Pearson Correlation -.516		.614	1

\*Correlations are significant at 0.05 (2-tailed); A - Self-depreciation, I - Infatuation, SN - Normal self-esteem; BS - CSS Baia Sprie

For CSS Baia Sprie in 2018, in the correlation table presented above it is observed that normal self-esteem correlates positively and significantly with the infatuation factor ( $r = .614$ ) and strongly negative with the depreciation factor ( $r = -.516$ ). Also between the infatuation and self-depreciation factors there is a significant negative correlation  $r = -.735$ . These correlations confirm the validity of the factors evaluated using the constructed questionnaire, but also draw

attention to a strong imbalance between the factors of infatuation and self-depreciation in their relationships with the factor of normal self-esteem. In addition, the strong negative correlation between the factors of infatuation and self-depreciation, confirms the normal disjunction between the two factors, when one of the factors increases, the other decreases significantly.

**Table 1. Correlations to the CSS Baia Sprie group,, 2019**

	A.BS.2019	I.BS.2019	SN.BS.2019
A.BS.2019	Pearson Correlation 1	-.698*	-.347
I.BS.2019	Pearson Correlation -.698*	1	.103
SN.BS.2019	Pearson Correlation -.347	.103	1

\* Correlations are significant at 0.05 (2-tailed); A - Self-depreciation, I - Infatuation, SN - Normal self-esteem; BS - CSS Baia Sprie

r the March 2019 measurements, the correlations of the factors presented in the previous table d to a significant decrease in the correlation index between positive normal self-esteem and 'atuation ( $r = .103$ ), as well as to the self-depreciation factor ( $r = -.347$ ). This shows us that if : self-esteem increases, the level of infatuation and self-depreciation will decrease.

The correlations for CS Alpina Baia Mare for the same factors taken into account are presented in the tables below:

**Table 3. Correlations to the CS Alpina Baia Mare group, 2018**

A.BM.2018	I.BM.2018	SN.BM.2018
1	-.626	-.408
-.626	1	.652*
-.408	.652*	1

\* Correlations are significant at 0.05 (2-tailed); A - Self-depreciation, I - Infatuation, SN - Normal self-esteem; BS - CS Alpina Baia Mare

For CS Alpina Baia Mare in 2018, the correlation table presented above shows that normal self-esteem correlates positively and significantly with the infatuation factor ( $r = .652$ ) and strongly negative with the depreciation factor ( $r = -.408$ ). Also, between the infatuation factors and self-depreciation there is a significant negative correlation  $r = -.626$ . Similar to the results presented for CSS Baia Sprie, these correlations confirm the validity of the factors evaluated using the constructed questionnaire, but also draw attention to a strong imbalance between infatuation factors and self-depreciation in their relationships with the normal self-esteem factor. In addition, the strongly negative correlation between the infatuation and self-depreciation factors confirms the normal disjunction between the two factors, when one of the factors increases, the other decreases significantly.

**Table 4. Correlations to the CS Alpina Baia Mare group, 2019**

	A.BM.2019	I.BM.2019	SN.BM.2019
A.BM.2019 Pearson Correlation	1	-.414	.134
I.BM.2019 Pearson Correlation	-.414	1	-.106
SN.BM.2019 Pearson Correlation	.134	-.106	1

\*Correlations are significant at 0.05 (2-tailed)); A - Self-depreciation, I - Infatuation, SN - Normal self-esteem; BS - CS Alpina Baia Mare

**Discussions and conclusions:** In the questionnaire applied to the subjects from the two sports clubs, CSS Baia Sprie and CS Alpina Baia Mare in October 2018, respectively April 2019, a first step of analysis was to analyze the correlations between the three defining factors of the estimate. of itself, based on two theoretical models (Rosenberg & Rosenberg, 1978) respectively (Owens, 1993). At the final measurement, in March 2019, the behavior of CS Alpina Baia Mare subjects underwent some changes highlighted by the significant negative correlation between normal self-esteem and the infatuation factor ( $r = -.106$ ) and a significantly positive correlation with the self-depreciation factor. This change in behavior needs to be analyzed and explored in depth in experimental research. A common observation of both clubs is that for athletes who have an extremely good opinion of themselves (infatuation) tend to have high scores on the factors motivational persistence, long-term pursuit of goals, pursuit of current tasks and recurrence of unattainable goals, with other quality words such as goal achievement, ambition, organization and perseverance tend to provide predominantly positive answers. Even if in some situations certain negative correlations are slightly noticeable, they indicate trends rather than certain connections. The general conclusion is to increase the performance of skiers through exercises to improve psychological aspects, increase self-esteem, incorporated in the annual training plan of athletes, alternating and combined in different ways, with a cyclical, weekly recurrence, depending on the competition periods and depending on the professional considerations of the coach.

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# ATTITUDES AMONG YOUNG PEOPLE IN ROMANIA REGARDING THE USE OF LIGHT DRUGS, AND THE RISK FACTORS ASSOCIATED WITH THIS USE

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**Abstract:** *The aim of the present research is to document the attitudes of young people in Romania regarding the use of light drugs (alcohol, tobacco, LSD and Cannabis). The study has three main research questions: (1) how spread is drug use among youth, (2) what are the general attitudes about this behaviour and (3) what is the link between drug use and risk taking in youth. The methodology used for this study is quantitative. An online survey was conducted in May 2021 (N=186, 74% urban and 26% rural, ages between 19-25, 75% females and 25% males). For the measuring of attitudes on risk, the Risk Scale was adapted from Risk-attitude Scale (Weber et al, 2002). The results of our research confirmed what was found in other studies that addressed this topic, especially when it comes to the risk factors associated to drug consumption. In general, people who use drugs are more prone to certain risks, and at the same time, people who take certain risks are more prone to drug consumption. When it comes to the attitudes of young people in Romania towards drugs, most of them had a negative or indifferent opinion.*

**Keywords:** drugs, risk factors, young people, Romania

## **Introduction**

The subject of light drug use among young people and students from all over the world is very popular and widely studied, given that this phenomenon is a considerable problem of the 21st century. According to various studies in the field, light drugs such as alcohol, tobacco, marijuana and LSD are among the most used drugs worldwide, they are very popular especially among young people. The discussion is therefore just as relevant when it comes to Romania.

According to the World Health Organization, Romania has a high per capita consumption when it comes to alcohol and tobacco. When it comes to Cannabis and LSD, studies show that they are also quite popular and commonly by young people, even if they are illegal in our country for the time being. In addition, there are many studies that investigate the relationship between drug use and various risk factors.

However, there are not many such studies in Romania. Thus, we decided that it would be interesting and relevant to conduct a quantitative study on this topic, in which we would

measure the attitudes of young Romanians towards drug use, if they have ever used these substances, the frequency of use, and the risk factors associated with the consumption of these substances.

## **Literature Review**

We propose to start the discussion on the topic of our study by analyzing an article, which is not a study in itself, but rather a vast literary review, a major compilation containing data from over 100 studies conducted in this field. "Substance Use Among College Students" (Child and Adolescent Psychiatric Clinics, 2016), the respective article, uses data collected until 2016 to present the rate of drug use among students, the popularity of certain specific substances, risk and protection factors, etc. , among US students. So, this is a study that talks about the issue of drug use as a whole. For example, it has been shown that during enrollment in higher education, the rate of marijuana use among young people increases, with 40% of students using cannabis before the first year of university, 50% during the first year, reaching up to 60% during the second academic year (Skidmore 2016). This fact is correlated not with the actual phenomenon of enrollment in higher education institutions, but with the phenomenon of completing the high school stage of study, because although students register a higher rate of consumption during university studies, at the same time they generally register a lower rate compared to former high school classmates, who did not enroll in a particular university after graduating from high school. The gender factor also plays an important role, as it has been found, males are more prone to the risk of using various narcotics, with the exception of tobacco cigarettes, which are more popular among females. Another important factor is the influence of colleagues, which determines a higher rate of consumption of psychotropic substances, which are seen by students as a social tool. It was also found that representatives of sexual minorities are more prone to drug use, while representatives of ethnic minorities are less prone to this. At the same time, the article notes that, unfortunately, there is very little data on the factors that prevent drug use among students, but from the little we have, interesting details can be highlighted about drug use among young people (Skidmore 2016).

Another study, called "Drinking and smoking as concurrent predictors of illicit drug use and positive drug attitudes in adolescents," investigates the relationship between smoking and drinking and illicit drug use in a cohort of adolescents in London. A high prevalence of drug experimentation and positive attitudes towards illicit drug use were characteristic of those who drank alcohol and smoked cigarettes regularly. There is then a clear hierarchy in which the lower preponderance of use and more negative attitudes, marked those who only smoke, then those who consume alcohol, while non-smokers and those who do not drink (the largest group) have had the lowest prevalence of drug use, as well as the most negative attitudes towards drug use (Best 2000).

Another important feature when talking about the study of illicit substances is the stigma that is associated with the consumption of various substances. One study that explores this topic is "Adolescent stigma towards drug addiction: Effects of age and drug use behavior." This study was conducted on the basis of data obtained through questionnaires addressed to a number of students. The results indicated that levels of stigma were higher among younger adolescents, as opposed to older ones, and the decline over age was robust, occurring in both men and women, but also in among those from rural and non-rural areas. However, the decline was stronger among drug users and those who had close friends who used drugs. Despite the age-related decline, the level of stigma has generally suggested that the stigma of drug abuse may continue into adulthood. The results show that individual attitudes towards drug use and drug users are key factors for personal drug use. Given that stigma is a barrier to treatment, on the other hand, reduced stigma may encourage greater use among adolescents. As a summary, this study highlights the need for more in-depth studies of drug stigma (Adlaf 2009).

Risk factors represent other important aspects for the study of drugs and societal attitudes towards these substances. Risk factors are characteristics that occur statistically more often among people who develop drug problems. Recent research indicates a considerable number of such factors, including individual, family and social and cultural characteristics. Research has shown that drug and alcohol use is associated with an increased risk of problems and addiction among young people. Furthermore, early experimentation with alcohol, cannabis and / or tobacco may increase the risk of early experimentation with other substances (eg: cocaine and hallucinogens). The substance use model states that the initiation of substance use follows a typical progression. Starting with alcohol and / or tobacco, continuing to cannabis and then other illicit substances.

A study called "Risk Factors for Drug Use among Adolescents: Concurrent and Longitudinal Analyses," examined the simultaneous and longitudinal associations between risk factors and substance use for a sample of high school students. Ten risk factors were defined that assessed many important personal and social areas of life. It was found that these factors are associated with permanent use, frequency of use and heavy use of cigarettes, alcohol, cannabis and strong drugs. There were no obvious gender differences in the number of risk factors. Finally, the number of different risk factors was predictive of increasing the use of all types of substances over a period of one year, after monitoring the initial level of use. Addressing risk factors is useful in understanding the vulnerability to substance use. The number of risk factors has been linearly associated with an increased percentage of drug users, frequency of drug use, and heavy drug use (Newcomb 1986).

Another interesting study that addresses the relationship between risk factors and drug use is "Risk-taking and drug-use behavior: An examination" by Edward M. Adlaf and Reginald G. Smart. The aim of this study was to investigate the relationship between several forms of drug use behavior and risk-taking. The authors predicted that risk-taking would be associated with: the addictive potential of a given drug, the level of drug use, and the use of polydrugs. No conclusive evidence was found to confirm the first two hypotheses; however, the data clearly demonstrated that the level of use of polydrugs was significantly related to the risk scores. The authors suggest that risk-taking as a general personality trait may more easily distinguish nonconsumers from users of different drugs. Thus, there is a connection between people who take certain risks and drug use (Adlaf & Smart 1983).

## **Methodology**

We used a questionnaire in Google Forms to collect the data needed to conduct our study. This questionnaire had 33 questions, and was completed by 186 people. The first set of questions was represented by a series of socio-demographic questions, these aimed to find out the age, gender, level of education, and other such details about the person completing the questionnaire. The second set of questions was related to the attitudes and personal experiences of young people regarding the use of light drugs, namely: alcohol, tobacco, LSD and Cannabis. People were asked what they thought about these substances, if they had ever used them, and how frequently have they used them. The last set of questions aimed to discover a connection between drug use and certain risks. The young people had to answer a series of social, ethical or health questions, including: "How likely are you to argue with a friend who has a very different opinion on an issue?" and "How likely are you to wear unconventional clothing?". Following data collection, they were analyzed in SPSS. During the analysis from SPSS we made a series of correlation and regression tables, which revealed a series of interesting details.

## **Data analysis**

To begin, we will analyze the first set of data, which is composed of a series of socio-demographic questions. Most respondents are between 19 and 26 years old. When it comes to

the gender of those who completed the questionnaire, 70% answered that they belong to the female gender, and 30% to the male one, no one mentioned that they belonged to a different gender.

Most respondents come from urban areas. An almost equal number of respondents live with their parents or live alone, also related to the parental situation, most of them claimed that they come from a biparental family (80%). An overwhelming majority (95%) mentioned that they are or have been students at a university. Most answered in the affirmative when we asked them if they had brothers or sisters. Finally, the answers were relatively even regarding the question of holding a job.

Next, we will analyze young people's attitudes towards drug use. They were asked what they thought about alcohol, LSD, tobacco and marijuana. The respondents had the following answer options: "Indifferent", "Positive Opinion", and "Negative Opinion". The results were as follows:

Most respondents consider themselves informed or at least fairly informed about the use and effects of mild drugs. Most respondents are indifferent or have a negative opinion about alcohol consumption. Most respondents have a negative opinion when it comes to LSD use. When it comes to cigarette smoking, most people are indifferent or have a negative opinion. On the other hand, when it comes to marijuana use, the answers are relatively equal, there is no clearly defined majority.

Then, the people who participated in this study had to answer some questions about the use and frequency of use of these drugs. They were asked if they had ever consumed alcohol, LSD, tobacco and marijuana, and had the following answer options: "No" and "Yes". When it comes to the frequency of use of these substances, respondents had the following options: "Daily", "Weekly", "Monthly", "Once a year or less". The results are as follows: 96% (178) of the respondents stated that they had consumed alcohol. Of these, the vast majority said they drank alcohol several times a year or monthly. When it comes to LSD, only 12% (23) said they had ever consumed it. Of which 98% said they consume several times a year or less. 86% (159) of the respondents stated that they consumed tobacco. Of which a majority of 60% smoke daily. When it comes to marijuana, 55% (105) of respondents said they used marijuana. Of these, a majority of 66% said they consume several times a year or less

Next, we will analyze the relationship between drug use and different risk factors. Respondents were asked to answer a series of social, ethical and health questions, measuring the likelihood of participating in a particular action on a scale of 1 to 5, 1 meaning "Not Likely" and 5 meaning "Very Likely". Most of the questions were taken from other studies, especially from "A domain - specific risk - attitude scale: Measuring risk perceptions and risk behaviors" (2002). The results are as follows in Table 1.

There is a correlation between alcohol consumption and the possibility of becoming violent in an emotionally charged dispute. At the same time, we can say that people who are more prone to violence consume more alcohol.

	Alcohol Consumption	How likely are you to become violent in an emotionally charged dispute?
Alcohol Consumption	.	.156*
How likely are you to become violent in an emotionally charged dispute?	.156*	.

Note. \* Correlation is significant at the 0.05 level (2-tailed), N = 186

**Table 1. Correlation matrix**

LSD use is related to the likelihood of expressing an unpopular opinion about a problem on a social occasion, the likelihood of cheating on one's partner and the likelihood of regularly

practicing a dangerous sport (eg climbing or parachuting). At the same time, we can say that people who take these risks consume more LSD (Table 2).

	LSD Consumption	How likely are you to express your unpopular opinion about a problem on a social occasion?	How likely is it for you to cheat on your relationship partner?	How likely are you to practice dangerous sports on a regular basis (for example, mountaineering or parachuting)?
LSD Consumption	.	.148*	.152*	.153*
How likely are you to express your unpopular opinion about a problem on a social occasion?	.148*	.		
How likely is it for you to cheat on your relationship partner?	.152*		.	
How likely are you to practice dangerous sports on a regular basis (for example, mountaineering or parachuting)?	.153*			.

Note. \* Correlation is significant at the 0.05 level (2-tailed), N = 186

**Table 2. Correlation matrix**

Tobacco use is also correlated with the possibility of becoming violent in an emotionally charged dispute, with the likelihood of expressing one's unpopular opinion about an issue on a social occasion, and with the likelihood of wearing unconventional clothing. At the same time, we can say that people who take these risks consume more tobacco.

	Tobacco Consumption	How likely are you to become violent in an emotionally charged dispute?	How likely are you to express your unpopular opinion about a problem on a social occasion?	How likely are you to wear unconventional clothes?
Tobacco Consumption	.	.147*	.150*	.227**
How likely are you to become violent in an emotionally charged dispute?	.147*	.		
How likely are you to express your unpopular opinion about a problem on a social occasion?	.150*		.	
How likely are you to wear unconventional clothes?	.227**			.

Note. \* Correlation is significant at the 0.05 level (2-tailed), N = 186

\*\* Correlation is significant at the 0.01 level (2-tailed)

Marijuana use is correlated with the probability of expressing an unpopular opinion about a problem on a social occasion and with the probability of cheating on their relationship partner. At the same time, we can say that people who take these risks consume more marijuana.

	Cannabis Consumption	How likely are you to express your unpopular opinion about a problem on a social occasion?	How likely is it for you to cheat on your relationship partner?
Cannabis Consumption	.	.193**	.172*
How likely are you to express your unpopular opinion about a problem on a social occasion?	.193**	.	
How likely is it for you to cheat on your relationship partner?	.172*		.

Note. \* Correlation is significant at the 0.05 level (2-tailed), N = 186

\*\* Correlation is significant at the 0.01 level (2-tailed)

**Table 3. Correlation matrix**

### Study limits

A possible limitation is represented by the possibility that the study will not be representative for all young people in Romania. Most of the respondents were students from Babeş-Bolyai University in Cluj-Napoca, so it is very possible that the study will not be representative for the whole country.

Another possible limitation is that many of those who completed the questionnaire might not have answered certain questions honestly. Some questions were more personal (especially those related to drug use and risk factors), so it is very possible that respondents felt embarrassed, and did not answer honestly despite the fact that the answers were anonymous. In the end, unfortunately, the results obtained were not as interesting as we would have hoped. We managed to correlate certain drugs with risk factors, but only with a few of them. And where there was a correlation, it was relatively low.

### Conclusions

Overall, our study served its purpose. We managed to find out the opinions and attitudes of a sample of young people in Romania regarding drug use. We also found out if they used light drugs (alcohol, LSD, tobacco and marijuana) and the frequency of use.

More importantly, we were able to make some correlations between drug use and certain risk factors. The results confirm the assumptions according to which drug use makes people more prone to certain risks, and also the fact that people who are willing to take risks are more likely to consume certain drugs. Thus, we consider that our study was a success, and that we uncovered some interesting details.

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# QUESTIONING THE NUMBERS: HOW MANY GAMER GIRLS ARE OUT THERE?

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**Abstract:** Reports indicate an almost equal distribution between men and women among video game players, but the methods of sampling and defining what a player is are ambiguous and does not help us to understand how many of those indicated as players are also considering games as their main leisure or entertainment activity. The present papers draw from the literature classification of gamers into hardcore and casual in an attempt to better understand the gender distribution in video games. With this goal in mind, we used a self-composed scale named the Casual Hardcore Gamer Assortment scale (CHG) on a sample of 492 men and women video game players recruited from communities dedicated to video games found on a popular social network site. Results indicate a positive correlation between CHG and gender, even though the girls in our sample have interests in games being part of that communities they seem to invest less time and economical resources in games. We are suspecting that, unfortunately, the gender balance in video games is one that leans more towards males, especially in the case of complex games.

**Keywords:** video games, gamer girl, video games demographics, gaming

## Introduction

In the present paper we are not discussing a difference in the skill of players among gamer girls and boys, many studies demonstrate there is little to no difference in essential abilities indicated as necessary for gamers among genders like cognitive (Fran & Lori, 2004) and biological response times (Shen, Ratan, Cai, & Leavitt, 2016). But we are addressing the distribution of gender among video game plays that is reported to be a relatively equal distribution.

Today, video games have become an increasingly popular way of consuming media, being considered globally one of the most popular leisure activities (Deleuze, et al., 2019). In 2020, the Entertainment Software Association reported 214 million players in the United States, of which 41% are female. According to the Interactive Software Federation of Europe (2020), half of the European Union's population (51%) currently plays video games, which means about 250 million players. Similar to data from the United States, a considerable proportion of players are women, namely 45% (Interactive Software Federation of Europe, 2020). These demographic data provided above have limitation in understanding the real number of girls that really prefer video games as their main method of entertainment. In most reports' gamers are vaguely defined, as is the case in the report form electronic software association that consider a gamer any person who invested one hour or more per week in video games (Entertainment Software Association, 2020).

The quantification of a person preference for video game in detriment of other forms of entertainment is difficult but not unattainable. In the industry and literature, we found a cataloging of gamers into two types: hardcore and casual. Classification that, although controversial, can help us to obtain a better image in the gender distribution among gamers. Hardcore gamers are investing substantial resources in video games, being them time, economical or emotional (Poels, Annema, Verstraete, Zaman, & De Grooff, 2012). In all reports that also take into consideration time spent playing, we can see that girls play less time than boys (Interactive Software Federation of Europe, 2020; Entertainment Software



Association, 2020). Above presented data is somehow controversial as analyses are presenting just mean hours played on the sample and among questioned girls could be girls playing many hours a week and some that play less, mean variable so is not useful in understanding the number of girls that really are consuming games as their main source of entertainment.

Furthermore, reports indicate that when girls do play online complex video games, they are subject to harassment, disempowerment and their skills are often put into question (Harrison, Drenten, & Nicholas, 2016; Tang, Reer, & Quandt, 2020; Bear, 2019), although ethnographic works suggest that this events are happening mainly when girls play with strangers online and are not so prevalent in video gamers friends groups that play together or in established communities (Nardi, 2010). Finally, it is worth taking a look at the Esport scene that is a new sport based on highly competitive games and those who participate in these sporting events are considered the most performant gamers. The small number of sportswomen in the field as well as the reports indicating discrimination against the few existing sportswomen question the official statistics that show a population of video game players divided almost equally between genders (Bányai, Zsila, Griffiths, Demetrovics, & Király, 2020; Darwin, Vooris, & Mahoney, 2020).

All this data and contradicting reports seriously bring into question the numbers of girls that are seeing games as a main entertainment activity, or that are considering themselves gamers. This question poses numerous difficulties, as qualitative data could provide some answers on the environment found in video games and the community response towards girls playing, it is not a good method estimating the number of girls playing. On the other side, quantitative methods could indicate, if it defines clearly what a gamer means, a better image but is also at risk that the sample is unbalance from other factors like data collection procedure.

## **Literature review**

### **Girls and video games**

Even though video games have established themselves over time as a male-dominated medium, and sometimes some elements, especially in complex games, seem to be designed with males in mind, there is no reason to believe that girls would dislike video games or that they would perform poorly in them (Walkerdine, 2007). Numerous studies have shown that girls can perform in video games as well as boys (Fran & Lori, 2004; Walkerdine, 2007; Shen, Ratan, Cai, & Leavitt, 2016), some studies even emphasizing on the advantages that girls bring in group online playing as they benefit to the team cohesion (Kim, et al., 2017). Despite this, girls are not taken seriously when playing games, especially competitive online games, most of the time they have to demonstrate their abilities more times than boys (Walkerdine, 2007; Greenberg, Sherry, Lachlan, Lucas, & Holmstrom, 2010; Nardi, 2010; Ruvalcaba, Shulze, Kim, Berzenski, & Otten, 2018; Kaye, Pennington, & McCann, 2018) and are exposed to more sexual harassment in online gaming compared with girls (Walkerdine, 2007; Ruvalcaba, Shulze, Kim, Berzenski, & Otten, 2018).

Another reason for which girls may restrain from involving in complex video games is related to time, girls of all ages seem to have less free time than males and this is a major impediment as complex games require a lot of time to master (Winn & Heeter, 2009). Girls attracted to complex games are not being taken seriously, but also, they are being judged for the attraction to complex games that contain boys' elements (such as violence), for this reason many girls prefer to distance themselves from games or limit themselves to more casual games that are seen more acceptable to be played by girls (Walkerdine, 2007).

### **Two types of video game players**

Between the two types of gamers, additional to the time, economical and emotion resource investments (Poels, Annema, Verstraete, Zaman, & De Grooff, 2012), there is a difference in

their preference in the products they consume. Hardcore gamers, tend to prefer more complex games than casual games, favoring elaborate story lines and intricate game mechanics that draw the player into the game world. Complex and difficult games, unlike a casual (or simplistic) game, require substantial time in game (Bossler & Nakatsu, 2006). Above mentioned elements, are true both during a single player individual game session and in online games. These complex elements found in games preferred by hardcore gamers include narrative and universe development features, perhaps this is why games often develop a culture among video game enthusiasts that includes competitions, conferences and other events as well as changes in clothing or even lifestyle (Netzey, 2015).

It is important to mention that the concept, as we mention, it's in some cases controversial. The concept may not arise naturally in the gaming community, some works suggest that the video game developers supported the classification through marketing campaigns and advertisements as it was favorable economically to have players demonstrate their devotion through economical investments (Kerr, 2006; Braegger & Moeller, 2021). So, even though today the community is largely using the terms, this can be a result of the industry intervention (Braegger & Moeller, 2021).

There are some authors that accept the distinction between two types of gamers but contest characteristic of these types, suggesting that the viewing of games as a hobby or not should be the main difference criteria. In doing so, contesting the importance of the involvement in the game, dedication to the game and the desire for achievement or competition. As a criterion in identification of those that play digital games as a hobby, authors indicate the imaginative play as a main indicator (Nacke, Bateman, & Mandryk, 2014).

## Methodology

### Instruments

In categorizing the gamer between the two types indicated by the literature, we used the Casual Hardcore Gamer Assortment (CHG) scale design by the authors and composed of 5 items related to aspects that other works indicate as prevalent among hardcore gamers. The measurement is based on a 5-point Likert scale. Scale validation was been asserted on a sample of 493 respondents. Following the application of the scale to our sample, the internal consistency index has a value of .748 (Cronbach's Alpha Based on Standardized Items .752). Higher means on the CHG scale indicate that the respondent present more elements specific to a hardcore gamer. Descriptive data can be consulted in table 1.

**Table 1. Descriptive Item Statistics**

	<b>Mean</b>	<b>Std. Deviation</b>	<b>N</b>
Over the last year, I consider that I have invested large sums of money in devices, gadgets or other purchases dedicated to video games	2.8032	1.42418	493
I tend to personalize everything with video game-specific elements	2.2312	1.30169	493
I take video games very seriously	3.1846	1.23976	493
I spend a lot of time in video games on a day off / weekend	3.5436	1.21501	493
I spend a lot of time in video games on a work / school day	2.7586	1.25448	493
Source: Data generated by the author			

Gender of the respondents was been asserted on a dummy variant based on a singular item that ask respondents to indicate their gender: men or women.

### Data collection procedure

Data collection was completed thru the distribution of the questionnaire in the online environment within communities dedicated to the video game topic from Facebook social network, we consider these communities to be composed of video game enthusiasts or at least persons that are interested in video games. The questioner was been publish in 25 groups dedicated to video games from the aforementioned social network site, each group number more the 500 members with the biggest group numbering 70.000 members.

### Sample characteristics

The sample includes 493 people, the majority of whom are male 74.8% (N = 369) while 25.2% (124) of people indicated female. The most represented age category consists of young people aged between 18 and 25, with 56.0% of respondents indicating an age between these limits, followed by 32.7% of respondents aged between 26 and 35, 5.9% aged between 36-45 years, people under 18 with 3.9% and those in the group 46-55 with 1.6%. We have no respondents who indicated an age of more than 56 years. Based on the last graduated school, we have the following composition on the sample: high school 46.0% (N = 227), higher education - bachelor 34.1% (N = 168), higher education - master 14.2% (N = 70), secondary education 4.5% (N = 22) and postgraduate education - doctorate 1.2% (N = 6).

### Results

Correlational analyzes were performed between the score from CHG and the following variables: gender, age, environment of origin (urban / rural), education, status (student / employee / unemployed) and preferred gaming platform (computer / console / phone). For the present paper, the most important correlation looks at the relations between CHG and gender (dummy variant, 1 – male and 0 – female). Results of the Pearson correlation indicated that there was a significant positive association between gender and CHG ( $r(493) = .166$ ,  $p = .000$ ).

**Table 2. Correlation between Casual Hardcore Gamer Assortment scale (CHG) and demographic variables**

	Gender	Age	Education	Status	Desktop	Console	Smartphone
Casual Hardcore Gamer assortment scale (CHG)	.166*	.043	-.077	-.069	.162**	-.070	-.225**
Gender		.072	-.037	-.105*	.017	.108*	-.241**
Age			.461**	-.378**	-.128**	.184**	-.096*
Education				-.250**	-.016	.036	-.039
Status					.104*	-.164**	.109*
Desktop						-.844*	-.415**
Console							-.122*

Note: \*\* $p < .01$  \* $p < .05$

Source: Data generated by the author

A simple linear regression was also conducted to predict CHG average scores based on gender variable. A significant regression equation was found ( $F(1, 491) = 13.968$ ,  $p < .000$ ) with a  $R^2$  of .028. Respondents predicted CHG score is equal to  $2.644 + .348$  (Gender) where gender is measured as a dummy variant in which 0 equal female and 1 equal men. Regression analysis indicate that males score higher than average on the CHG then women.

**Table 3 Linear Regression between Casual Hardcore Gamer Assortment scale (CHG) and gender variable**

<i>DV: CHG</i>	<i>B</i>	<i>SE (B)</i>	<i>β</i>	<i>t</i>	<i>Sig</i>
Gender (0 = female; 1 = male)	.348	.093	.166	32.786	.000
F = 13.968; p < .000; R <sup>2</sup> = .028; N = 492					
Source: Data generated by the author					

### Commentary and conclusions

In the current paper we set out to investigate by quantitative methods a possible discrepancy in the demographic data reported by large entities activating in the video game industry. If we talk about playing video games as the main source of entertainment, based on the data from the present research, at least in the case of girls, there seem to be a significant lower proportion of passionate players (people that play with some degree of regularity). The results are in line with the observations of other papers indicating gender discrimination, harassment and a lack of trust in girls that play video games, especially complex games (Walkerdine, 2007; Winn & Heeter, 2009; Harrison, Drenten, & Nicholas, 2016; Bear, 2019; Darwin, Vooris, & Mahoney, 2020). Based on this information we can expect many girls to distance themselves from video games and choose other forms of entertainment.

Lower percentage of girls in the sample may in itself be evidence of the demographic discrepancy between boys and girls among video game enthusiasts. The data collection method focuses on groups dedicated to video game players on Facebook, through this method we want to target the passionate players population based on the assumption that in these groups we find only people who are in some extent interested in video games.

The scale used in the present paper is based on the categorization of players into two types of gamers (hardcore and case), emphasizing on the characteristics of hardcore player. The scale may be used to designate whether or not a player is passionate as a higher mean on the scale is indicating that the respondent offers greater importance to the specific elements related to a passion for video games. Those specific elements are substantial investment of economical and time resources through video games, a greater cultural implication with video games and a more serious approach of games.

Our approach has considerable limitations, it is a quantitative approach to a sensitive issue but categorizing players based on the typology of the hardcore gamers may not necessarily give us an exact picture. There may be video game enthusiasts that are passionate about video games but do not have elements specific to a hardcore player. Furthermore, the literature based on the typology of a hardcore player may be based on data specific to boys, in the case of girls' other characteristics may be the basis of their passion for games. Additionally, the data collection procedure as well as the small number of girls in the sample is a real problem, especially in a paper that addresses the topic of video game players. It is possible that the small number of girls who completed the questionnaire may be the result of a small number of girls on Facebook groups dedicated to video games. This small percentage of girls on the dedicated groups from the platform chosen, in itself may be evidence of demographic inequality between girls and boys in games but at the same time there could be that girls prefer other ways to talk to community members or receive game news.

Although it is possible for a significant number of girls to play video games occasionally, the number of girls who are passionate about video games and who choose games as their preferred method of entertainment unfortunately remains low. Although it has its limitations, this paper confirms to some extent a different picture in terms of the demographics

of video games. However, more detailed research is needed for a better understanding of the phenomenon.

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# TRANSPHOBIA AND TOXIC MASCULINITY IN MODERN SOCIETY

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**Abstract:** *Toxic masculinity has been as popular of a topic in recent years, as the LGBTQ+ community has gained traction. In feminist discourse, leftist ideology, and secular discussions, both are highly debated subjects. But what exactly are they and how do they link? Transphobia, as we will see, is a fear of transgender individuals, although fear is a lot said. It is more of an aversion to it, which can come with threatening and violent reactions towards the community. Toxic masculinity, on the other hand, is a term that encompasses a cluster of negative traits that are stereotypically masculine. This type of masculine typology is centered around a denigrating view of women and individuals who do not fit into a heteronormative box. Both are rather violent characteristics, which is why they tend to overlap. The purpose of this paper is to see how much they correlate, as well as seeing how prevalent these issues are in Romania.*

**Keywords:** toxic, masculinity, transphobia, Romania

## **Introduction**

Toxic masculinity has been as popular of a topic in recent years, as the LGBTQ+ community has gained traction. In feminist discourse, leftist ideology, and secular discussions, both are highly debated subjects. But what exactly are they and how do they link? Transphobia, as we will see, is a fear of transgender individuals, although fear is a lot said. It is more of an aversion to it, which can come with threatening and violent reactions towards the community. Toxic masculinity, on the other hand, is a term that encompasses a cluster of negative traits that are stereotypically masculine. This type of masculine typology is centered around a denigrating view of women and individuals who do not fit into a heteronormative box. Both are rather violent characteristics, which is why they tend to overlap. The purpose of this paper is to see how much they correlate, as well as seeing how prevalent these issues are in Romania.

## **Transphobia**

Transphobia refers to aggressive reactions to persons considered to be “trans,” a word generally used to characterize people whose own gender designations differ from their assigned gender or the administrative sex category indicated on their original birth certificate. The term “trans” has also been used to describe persons whose features and conduct deviate from anticipated gender standards in a certain setting.

Ever since transphobia was first measured in 2005, researchers using the transphobia guideline have shifted the focus of their studies from attempting to identify the roots of the existence of “trans people” to investigating the causes and consequences of hostile and discriminatory treatment of “trans people”. The transphobia framework's limitations include its dependence on a “transgender/cisgender” gender dichotomy and the omission of subtle, implicit, and benign forms of delegitimization and exclusion experienced by trans individuals (Ansara, 2016).

Verbal abuse, physical violence, and murder are all examples of transphobic conduct. Transphobia has been studied in a variety of cultures, including Hong Kong, the United Kingdom, and the United States. Being targeted for transphobia has been related to physical and mental distress (Mizock and Lewis, 2008), as well as increased rates of attempted suicide (Clements-Nolle, Marx, and Katz, 2006). Hill (2002) proposed two more components to conceptualize hate against transgenders, in addition to transphobia (the attitudinal component): genderism (the cognitive component) and genderbashing (the behavioral component).

Genderism, in particular, is a societal system of ideas that promotes unfavorable evaluations of persons who do not adhere to society's gender role standards. Genderbashing is the harassment and/or physical attack of persons who do not adhere to society's gender standards. Sugano et al. (2006) have recently proposed that the term transphobia "refers to societal discrimination and stigma of individuals who do not conform to traditional norms of sex and gender".

While there has been a significant amount of research generated on homophobia, transphobia stays an understudied issue. Furthermore, the majority of current research do not differentiate transgenders from the gay, lesbian, and bisexual (LGB) community and do not tackle the distinctions between gender role, gender identity, and sexual orientation. In reality, transgender people exist outside of the male/female gender binary, whereas LGB people exist outside of the anticipated heterosexual identity (Warriner, 2013). Both demographics, however, just as Tebbe mentioned in his 2012 study, are contesting the male–female binary concept and share some prejudice mechanisms.

In regards to prejudice, Dovidio in his 2010 work, has a very helpful definition of the term. He says that prejudice refers to preconceived, generally negative, judgements about persons or groups based on personal traits (such as gender, socioeconomic status, age, handicap, religion, sexuality, race/ethnicity, language, nationality). Understanding bias processes is critical for reducing their damage through psychoeducational, therapeutic, and social treatments. Discrimination is the unfair treatment of a person because of his real or perceived membership in a certain group or category, which often leads to isolation (Applebaum, 2009).

Harassment refers to a wide variety of objectionable acts intended to annoy or offend others. Transgender people endure continuous and significant prejudice in a variety of life arenas. Economic discrimination, harassment at home, work, and school, and discrimination by government agencies, medical professionals, and other service providers were among the disturbing issues mentioned (Willoughby, 2010; Whittle, 2007; Kosenko, 2013). Violence, physical and verbal abuse, and sexual assault motivated by the victim's gender identification are all common, while the exact degree is unknown (Clements-Nolle, 2013; Lombardi, 2001).

Hate crimes against sexual minorities are extensively documented and known. Green defines a hate crime, in his 2001 study, as an "unlawful, violent, destructive or threatening conduct in which the perpetrator is motivated by prejudice toward the victim's putative social group". The most horrifying manifestation of transphobia is the murder of hundreds of transgender people throughout the world, as recorded by the most recent death records supplied by the Transgender Europe network (TGEU) on March 12, 2013, as part of its Trans Murder Monitoring Project. From January 1st, 2008 to December 31st, 2012, 1,123 transgender people were murdered in 57 nations throughout the world, according to such data. Over the previous five years, there has been a steady increase in recorded killings of transgender people, the most of which have occurred in Central and South America. Furthermore, it should be noted that this figure may be understated because data on these killings is not routinely collected in most nations.

Thornicroft (2009) mentions that stigma has an impact on the sentiments, attitudes, and conduct of both the person afflicted and family members. Lower self-esteem, worse self-care,



and social isolation have all been related to stigma (LeBel, 2008). Clements-Noelle, Lombardi and Winter have also documented the negative impact of transphobia on the lives of transgender persons (2006; 2001). Many transgender people in Europe continue to conceal their gender identity due to prejudice, discrimination, and violence. Furthermore, transphobia may be a factor in the high rates of psychological distress and suicide ideation reported among transgender people (Bockting, 2005; Clements-Nolle, 2006).

Stigma has a significant detrimental influence on the lives of victims. For example, they may be concerned about how "normal" people would see them (Goffman, 1963) and constantly wonder what impression they are creating (Rush, 1998). Furthermore, stigma is linked to maladaptive emotion regulation techniques, which result in increased psychological discomfort (Hatzenbuehler, 2013), as well as maladaptive coping behaviors (such as smoking and drinking) (Pachankis, 2014), which raise the likelihood of negative health outcomes.

Transgender people have low self-esteem and social isolation, as well as high rates of depression and suicide ideation and attempts throughout their lives (Dean, 2000; Clements-Nolle, 2006). Several recent researches have focused on investigating the existence of a link between transphobia and mental health. Transphobia, in particular, has been shown to be strongly linked with present depression (Clements-Noelle, 2006; Rotondi, 2011) and suicide risk (Marshall, 2011).

The influence of stigma on mental health, resilience, and identity is highly dependent on the age at which it is encountered. In the case of transgender adolescents, it is widely documented that encountering stigma at a young age increases the likelihood of isolation, academic performance difficulties and school dropout, homelessness, drug addiction, and suicide (Grossman, 2007; Garofalo, 2006).

On the other hand, because their gender identity is observed and replicated by society, this kid might acquire early resilience and, as Bockting (2014) points out, can quickly establish a cohesive sense of self. Youth who have not yet expressed a nonconforming gender, on the other hand, may have additional challenges in developing their transgender identity; in fact, they may spend their lives disguising their gender identity in order to comply to external expectations. As a result, individuals lack external validation of their identity, which may result in mental health issues (for example, obsessive/compulsive symptoms connected to cross-dressing and gender dysphoria) and identity confusion.

### **Toxic masculinity**

While anyone can be toxic, for a while now the term has been used in the context of gendered toxicity. There is toxic masculinity and femininity. While the former is an internalized and self-deprecating type of behavior, toxic masculinity is focused on externalized and aggressive attitudes found within mostly male-identifying individuals. Of course, men and masculinity are diverse and there are no set rules on how to be a man "correctly".

Nonetheless, there are some potent definitions given by researchers. "Toxic masculinity involves the need to aggressively compete and dominate others and encompasses the most problematic proclivities in men [...] Toxic masculinity is the constellation of socially regressive male traits that serve to foster domination, the devaluation of women, homophobia, and wanton violence" (Kupers, 2005). Basically, toxic masculinity encompasses harmful actions that our society typically associates with men.

One of the reasons for the existence of this type of behavior, is the pass that society has given to men in power. In the past, they had taken over the workforce, leading positions and many marriages were set up regardless of how women felt about it. Because of that, a sense of entitlement spread. Ideas such as "check your privilege" spread in the past years, and then quickly became a joke on the internet – but they do foster some truth. The more power you hold, the more likely you are to abuse it. Hence there is no denying our patriarchal society had

some devastating effects. Toxic masculinity affects both men and women, as it corners men into a stereotype, while women and non-heteronormative people are at risk (Kupers, 2005).

Nowadays, superficial ideas about how masculinity looks like are widespread in the media, where the typical “macho” guy is strong, heterosexual and dominant (Elliot, King, 2018). These ideas influence the minds of young people, who then mimic these toxic traits over the course of their lives. Evidently, the environment is also a factor of how harmful someone might act. In prisons, for example, the toxic masculine traits are even more pronounced than normal (Kupers, 2005). Another problem is the way we use language, as “this is so gay” and “pussy” are used as insults (Elliot, King, 2018). Still, these traits can differ depending on the context and cultures being considered, as they are not completely universal (Salter, 2019).

As feminism spread, a focus on how women are doing in the world has become prevalent. A push towards more inclusion, better education and places in the workforce has been made for women. However, it seems that there has been less focus on the men who inadvertently became sidelined and struggling to keep up with the changes of the world (Lomas, 2013). Lomas suggests that men have been put into a box of “damaged goods”, as they struggled with their education and health compared to women. Men tend to struggle when it comes to their mental health as well, since many of them are resistant even to psychotherapy (Kupers, 2005). While we quickly dismiss the issue as needing a change in mentality, our society as whole is not putting in effort towards helping them. For example, the over availability of alcohol which has proven to cause more domestic violence (Salter, 2019).

Nevertheless, toxic masculinity affects especially people who are part of the LGBTQ+ community, as they stray from what is considered “acceptable” and “normal”. Homophobic tendencies are a common trait of toxic masculinity, since being gay has some sort of odd implication of being weak or womanly. Of course, this has its own divergences. Women, for example, might not be taken seriously when they say they are gay, being dismissed as going through a phase. This, in a sense, is a way of patronizing them, making it seem like women are not capable of knowing what they want. In the case of men who are gay, this can get very violent, however. It is enough to look at the many countries that still hold homosexuality as illegal.

Transphobia might also relate to the hatred of women. Why would a man want to be a woman? Men are protectors and fighters – no man should be a “pussy”. At the same time, a woman wanting to be a man would be an attack towards men's place in society. If women can be men, then are men really superior to women? In order for this kind of toxic thinking to exist, men need to be fed with the idea that each sex has its own predefined roles that cannot be changed. Women are stupid, sensitive and good caretakers, while men are fighters, strategists and hold no emotion besides anger. Toxic masculinity also comes from a place of self-doubt, which is what makes them rely on these superficial stereotypes in order to improve their perceived status.

We know for sure that “men are able to resist or redefine traditional norms to negotiate a more ‘positive’ construction of masculinity” (Lomas, 2013). However, this circle of hatred can only change once we give proper education to young men and people in general. Explaining why certain words are derogatory, as well as helping them empathize with victims of abuse, rape and discrimination are just some of the things we can include in courses and classes designed for this purpose (Posadas, 2017).

## **Survey Results**

For the purpose of this paper, a survey has been done on the topic of “Toxic Masculinity and Transphobia” where there have been over 100 participants, with ages ranging from 16 to 49. Diversity is present in the survey not only through the wide age range but also through religion,

ethnicity, and relationship status, which all vary a lot. The aim of the survey was to see how much transphobia and toxic masculinity are present in Romanian society in particular.

**Table 1: Correlation between gender and sex and the view on gender and sex**

Correlations						
		What is your gender?	People are either men or women	If I found out that my best friend was changing their sex, I would freak out	Smoking or drinking is not appropriate for a self-respecting woman	Men need to act strong even if they don't feel like it
What is your gender?	Pearson Correlation	1	.139	.289**	.302**	.280**
	Sig. (2-tailed)		.157	.003	.002	.004
	N	105	105	105	105	105
People are either men or women	Pearson Correlation	.139	1	.453**	.300**	.492**
	Sig. (2-tailed)	.157		.000	.002	.000
	N	105	105	105	105	105
If I found out that my best friend was changing their sex, I would freak out	Pearson Correlation	.289**	.453**	1	.366**	.508**
	Sig. (2-tailed)	.003	.000		.000	.000
	N	105	105	105	105	105
Smoking or drinking is not appropriate for a self-respecting woman	Pearson Correlation	.302**	.300**	.366**	1	.339**
	Sig. (2-tailed)	.002	.002	.000		.000
	N	105	105	105	105	105
Men need to act strong even if they don't feel like it	Pearson Correlation	.280**	.492**	.508**	.339**	1
	Sig. (2-tailed)	.004	.000	.000	.000	
	N	105	105	105	105	105

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The most significant correlation present in the table above is the one between the question "Men need to act strong even if they don't feel like it" and "If I found out that my best friend was changing their sex, I would freak out". Both are Likert scale questions, from one to five, with one being "strongly disagree" and five being "strongly agree". The Pearson correlation number is 0.508 which indicated a rather strong correlation between these two statements. Given the fact that the number is positive, it means that the correlation between them is directly proportional. Whenever one grows, the other one grows in the same direction. For our particular example that would mean that the more likely you are to strongly agree to the statement that "Men need to act strong even if they don't feel like it" the more likely you are to strongly agree to the statement "If I found out that my best friend was changing their sex, I would freak out", and vice versa.

The next most relevant correlation from the above table is the one between the statements "Men need to act strong even if they don't feel like it" and "People are either men or women", both of which once again fit into the Likert scale question type. The Pearson correlation number is 0.492 which indicated a very high correlation between these two statements. In other words, people who are more likely to strongly agree to the statement that "Men need to act strong even if they don't feel like it" are more likely to strongly agree to the statement "People are either men or women" and vice versa. In the survey participated 71 females, 31 males and 3 people that said "prefer not to answer". If we are speaking, that would mean that 67.61% are women, 29.52% are men and 2.85% chose prefer not to respond.

**Table 2: Correlation between gender and emotions in a male**

Men need to act strong even if they don't feel like it							
		Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
What is your gender?	Female	53	7	9	2	0	71
	Male	13	11	4	1	2	31
	Prefer not to respond	1	0	2	0	0	3
Total		67	18	15	3	2	105

In the above shown table, we have analyzed the results for the “Man need to act strong even if they don't feel like it” question, in regards to the gender. 53 out of 71 women answered that they strongly disagree, which means more than 70% of women. None of the women answered that they strongly agree with the statement. When it comes to men, 13 out of 31, so less than 50%, answered that they strongly disagree. Here, unlike by women, there were two men who answered that they strongly agree with the statement “Men need to act strong even if they don't feel like it”, which would mean about 6% of all the men who answered.

**Table 3: Correlation between gender and a sex change operation**

If I found out that my best friend was changing their sex, I would freak out							
		Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
What is your gender?	Female	49	8	6	6	2	71
	Male	14	5	4	6	2	31
	Prefer not to respond	1	0	0	1	1	3
Total		64	13	10	13	5	105

In the above shown table we analyzed the results for the statement “If I found out my best friend was changing their sex, I would freak out” in relation to gender. 49 out of 71 women strongly disagree with the statement, so almost 70% of them. 14 out of 31 men, strongly disagree with the statement, which means about 45% of them. 2 men and 2 women said that they strongly agree with the statement “If I found out my best friend was changing their sex, I would freak out”, which in percent means 2.8% of women and 6.45% of men.

## Conclusion

In our paper, so far, we have discussed transphobia, toxic masculinity, as well as correlations between the two. In the end, there seems to be some correlation between toxic masculinity and transphobia, at least in Romania. Men who believe they need to act strong no matter what are also likely to be scared of trans people. The need to not feel weak is easily recognized as a toxic masculine trait. By being scared for someone because they do not identify to the gender given at birth, it shows us that the two are related. A reason for that could be an underlying hate for women. Since being trans means that women can be men and men can be women, that means men are no longer superior or justified to be aggressive. Nonetheless, through education toxic traits can be fixed and improved. Because of that, courses surrounding sex education, gender, consent, empathy and early psychotherapeutic help would be very helpful in minimizing the aggressive behavior found in some people.

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# THE POWER OF AUTHENTICITY IN INFLUENCER MARKETING: INVESTIGATING THE USERS' PERSPECTIVE

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**Abstract:** *The current study examines the issue of perceived authenticity of social media influencers from the perspective of the users. As social media is continuously developing and online consumption is growing year by year, social media influencers have become independent advertising channels. An influencer can be defined as a third-party entity with strategic abilities, who created advertising materials, distributes them, engages with targeted audiences, and establishes a digital persona. The multifaceted dimensions of perceived authenticity and its effects on social media users have been highlighted in a consistent body of literature, focusing on Lee's (2020) authenticity model of communication. By approaching the subject of authenticity versus advertising in a qualitative manner, a focus group was conducted, as it was considered to be the research method that would imply the least limitations regarding the general attitude towards the phenomenon as a whole. A comprehensive investigation was carried out. The findings provide valuable insights for both marketers and social media influencers on how to increase effective communication while maintaining authenticity.*

**Keywords:** social media influencer, influencer marketing, authenticity, online advertising.

## Introduction

As the field of influencer marketing continues to grow, studies have focused more and more on this issue and, additionally, on the users' perspective on advertising and social media influencers. One notable element that plays a critical role in decision-making is perceived authenticity, thus scholars speculated that, although certain aspects overlap credibility, it is still one of the key components that can be analyzed with the intention to measure brand awareness, persuasiveness, purchase intention and the general attitude towards the phenomenon, including social media influencers. This present study approaches the subject of authenticity versus advertising in a qualitative manner, carried out on the basis of Lee's authenticity model of communication (2020).

## Literature review

### *Defining a social media influencer*

Over the years, the term *influencer* has received an abundance of definitions, interpretations and attributes, fluctuating from negative to positive and, naturally, the other way around as well. According to Cambridge Dictionary, an influencer defines "someone who affects or changes the way that other people behave", as well as "a person who is paid by a company to show and describe its products and services on social media, encouraging other people to buy them".

While a number of descriptions of the term can be subjective, it is necessary to acknowledge the latest version of the Code of Practice in Commercial Communication (2021), ratified by the Romanian Advertising Council (RAC), proposing a formal definition: "influencer (e.g. blogger / vlogger / referrer): a person who makes public his or her views and

/ or advice on advertiser products and / or services under a contractual relationship, in a manner and style which are his or her own. An influencer can intervene in an editorial context or in collaboration with a brand in order to publish specific commercial content”.

Although the term involves under its umbrella all content creators on the existing social media platforms, influencers can be categorized by number of followers, type of content, engagement rate, skill set and the way they are perceived by their audience. A social media influencer (SMI) can be defined as a third-party entity, who possesses certain strategic abilities, in order to create advertising content, distribute it, engage with targeted audiences and establish a persona, with the purpose of having an impact on organizational stakeholders (Enke & Borchers, 2019). The classification of SMIs is shaped by taking into consideration other factors, either objective or subjective, such as personal branding, perceived authenticity, accessibility, knowledge, cultural references and ingenuity (Campbell & Farrell, 2020).

Moreover, further research shows us that the two significant features for a SMI are reach and impact. Three critical traits were established in achieving successful influencer status: expertise, authenticity and intimacy, which display significance in determining a SMI's capacity to change a follower's purchase intention (Hudders et al, 2020).

The prominent attribute for a SMI is follower base, which can be classified in five different divisions:

- celebrity influencers: they often have over 1 million followers;
- megainfluencers: same as celebrity influencers regarding the number of followers, but the notable difference between the two categories is that megainfluencers have gained their base prior to notoriety;
- macroinfluencers: they have between 100,000 and 1 million followers;
- microinfluencers: they have between 10,000 and 100,000 followers;
- nanoinfluencers: they have under 10,000 followers (after Campbell & Farrell, 2020).

In a video essay called “Investigating the influencer to pop star pipeline”, which was posted on the 27th of May of this year, Australian youtuber Michael Messineo, also known as Mike's Mic, highlights the latest trend of influencers trying to reach mainstream media through making music, remarking a reverse phenomenon of mainstream celebrities turning into social media influencers. The transition implies that, at first, the path can seem difficult and the process appears challenging, it needs to be addressed that being a SMI shifted from a hobby or a passion, to a full-time job (Balaban, 2021), due to visibility, creativity and consistency on social media platforms. Nonetheless, although a SMI's platform is an advertising channel, being an influencer cannot be defined as a profession, on the grounds that, according to Romanian legislation, an influencer cannot sign an Employment Contract and can represent brands and companies exclusively based on a Copyright Transfer Agreement or a Service Contract (Udriste, 2020a).

Whether we look at things from an advertising perspective, influencers exhibit three key factors for marketers:

- the relationship with followers or subscribers, which is critical in a commercial context. In the decision-making process for a consumer, the source of information plays a significant role. The SMI's duties consist of providing organic reach, specific targeting, and attention to the product they are advertising.
- the role of an endorser, as the main responsibility for an influencer is to advertise products. For this to happen, a SMI needs to possess a set of attributes, such as expertise (for instance, athletes who also become influencers), attractiveness (Balaban, 2021), persuasion or notoriety (as an example, mainstream celebrities with large online audiences). Certainly, it is



not a requirement for an influencer to be already famous, as fellow consumers who do not have a considerable following can still call themselves influencers.

- the social media management role. As it needs to be regarded as a range of activities, depending on the skills and assets the influencer has acquired through experience, marketers may have various expectations from a collaboration with an SMI. For instance, it may be necessary to create a social media strategy from the very beginning, or to exclusively appear in a photoshoot and post the pictures on Instagram (Campbell & Farrell, 2020).

### **Influencers and their role in the advertising industry**

The primary objective of advertisements is to sell products, but it is necessary to acknowledge the reality that it has surpassed this individual purpose long since. In this modern-day society, advertising sells a lifestyle. People consume advertisements as cultural products and, gradually, they have acquired an independent status. Baudrillard (1996) underlines the fact that the public is lured in by the industry's concern to continuously present products and manifest a rather visible attention, therefore subjects are oblivious to the restrictions they are imposing to themselves by constant consumption.

With the purpose of comprehending the phenomenon, it needs to be addressed that advertising, by its own nature, will appeal to the targeted audience particularly through the proper media channels (Balaban, 2021). For instance, young people, referring to millennials (people born after 1981) and generation Z (people born after 1996), either grew up or were born during the dot-com bubble, a time period when the Internet became massively popular. They appreciate freedom of speech and choice, which is the reason why they are the biggest Internet consumers nowadays and tend to use less and less traditional media channels. It is rare to find TV shows that are targeted towards the younger generations and, to this degree, brands and services which are designed for them will advertise their products on social media platforms. As it was previously mentioned, ad blockers have gained popularity among young people and, as a result, marketers rely on SMIs as an advertising channel. All things considered, the popularity of influencers is apparent and undeniable.

An arguable statement lies in people's reluctance in accepting that new media channels suggest a reassessment of creative systems. Looking back at the beginning of social media platforms, there were considerably more consumers than producers (Henriksen & Hoelting, 2016). Nowadays, the places were reversed: for instance, there is no possibility for someone to watch all the existing content on YouTube during his lifetime, even considering that new videos will not appear anymore. The rise of content creators gave the opportunity to find something appealing to each Internet consumer and the ability to develop an expertise for an influencer.

Additionally, the content created by influencers with a commercial purpose integrates into the setting they are deliberately placed into, coordinating its characteristics to the platforms and the rest of the SMI's non-commercial content (Campbell & Grimm, 2019), which makes the advertisements feel more natural and authentic. As opposed to above-the-line marketing, below-the-line strategies focus on targeting a specific audience, thus people that use the Internet regularly become goal-oriented and trust the SMIs they are following on platforms such as YouTube or Instagram, whereas they offer a distinct benefit from traditional media, which is the opportunity to openly share opinions and experiences with other communities.

In most cases, advertisements created by influencers are perceived as more authentic compared to ones developed by brands (Campbell & Farrell, 2020). Moreover, an influencer's trustworthiness will increase at the same time with informative value: it has been shown that brand awareness and purchase intention enhance simultaneously with the informativeness, entertainment and credibility of an influencer. Followers tend to appreciate a brand more if they use influencer-generated posts, especially due to their expertise and likeability (Lou &

Yuan, 2019). For marketers, it is important to take into consideration the attributes that complete the influencer, especially trustworthiness, and to focus less on engagement metrics (Balaban et al, 2020), or, up to a certain point, to put less pressure on numbers, for the reason that buying bots that behave as followers has developed into a real issue, due to reach being a major reference point in selecting a SMI for a campaign (Enke & Borchers, 2019). Another argument that needs to be addressed is that a high number of followers will generate the idea that the endorsed product is not unique, because too many people would be interested in it (De Veirman et al., 2017).

Furthermore, advertising has determined the consumers' fragility, which is the reason why the action of acquisition is secondary. It diminishes a type of social uncertainty by providing an intimate perception. Emphasizing the indispensability of commercials in a product's social presence, advertising ensures a psychological existence, facilitates and completes the consumption (Baudrillard, 1996). In this manner, due to younger generations following SMIs and receiving advertisements on social media channels, platforms which were initially designed for connecting with friends and members of the family, the process of developing a parasocial relationship with an influencer becomes easier than in the case of a mainstream celebrity appearing on TV (Balaban, 2021). The dual nature of the content influencers are posting on their platforms, both personal and commercial, contributes to creating and maintaining a closer relationship with followers who identify them as online friends.

An individual develops a relationship with a product, comparable to the manner in which humans create connections between themselves. Due to purchasing and consumption, the identity of the user connects with the identity of the product (Baudrillard, 1996), but, what is more, regarding influencer marketing, an image transfer occurs each time a SMI advertises a product (Udriste, 2020b). Aside from the prohibition on marketing products from rivals' brands, celebrities and influencers must promote things that are consistent with their image, in order to add value to the brand, user's attitude towards the brand, as well as brand recall (Balaban & Racz, 2020). A transfer of image materializes every time a celebrity or an influencer endorses a product, referring to the fact that the influencer will be associated with the brand's values and characteristics, and the other way around in the same way (Balaban & Mustatea, 2019).

From an ethical perspective, both brands and influencers need to associate their image with entities that match with their values and are positioned on the same side of the spectrum. In other words, agencies and brands are supposed to investigate the influencer's social media background, as well as previous collaborations, communication strategies, interactions with followers or subscribers (usually through public comments) (Udriste, 2020b). On the other hand, although it can be described as a moral matter, an influencer who has a large following will appeal and have a positive or negative effect on more people, as it is human nature to trust a person that is engaged to a considerable community, from which validation is received, should exclusively endorse products or service that he or she uses genuinely (Udriste, 2020a).

A significant concern is represented by the ethics of a SMI. More often than not, an influencer will perform a variety of activities at the crossroads of marketing, public relations, and journalism, hence the lack of particular SMI communication ethics. As they are sometimes implicated in distinct parts of the advertising strategies, usually different ethical principles would be applied accordingly, but it is unattainable to adapt them to situations in which they are required. An approach similar to the one depicted above would be perceived as disproportionate in regards to the other fields and the effectiveness they have on influencer marketing as a practice collectively (Enke & Borchers, 2019).

## **The perceived authenticity of SMIs**

One of the key reasons why we form relationships with people in our daily life is because we trust them. The same mechanism is applied to people we follow on social media. It is not peculiar to feel attached to a SMI, although it is mostly a unidirectional type of communication, but there are cases when a follower connects with an influencer, either through comments, direct messages, or physical interaction. This concept is called parasocial relationship. An element that creates and facilitates this bond is authenticity, which can be labeled as different experiences. For instance, a case in which a SMI's authenticity will decrease is the moment he chooses to endorse an inappropriate product (Giles, 2002).

First of all, we need to define authenticity in order to determine its implications in influencer marketing. Many studies have centered their topics around this particular subject, as it holds significance over the decision-making processes of audiences and, therefore, customers. The concept of authenticity is abstract and complex, as it remains of great interest for researchers and scholars. The subject of authentic existence is discussed in philosophy, where it finds its foundation. At the core of it, authenticity is about how we perceive and engage the world in our ordinary lives. Heidegger claims that the challenge itself lies in finding one's true calling and purpose, although it should not demand complicated endeavors or self-control, but the opposite, it ought to be genuine and effortless (Sherman, 2009). Living in an authentic manner means to be independent in taking your decisions, concerning actions that may lead to favourable or less favourable consequences (Baugh, 1988). We should remark that despite the concept of personal authenticity leading to various definitions, the agreement that it is a changing notion, rather than an inflexible one, remains constant, thus the theme of authenticity cannot be approached by a yes or no inquiry. Authenticity and inauthenticity are not concepts that exclude one another, but rather encompass the duality of people.

Authenticity has always been important, but the rise of misinformation and the influence it has on people has further reinforced the need for it (Lee, 2020). Although it is regarded as a mainly positive trait, it is now a source of doubtfulness, as people tend to have a radical view of it, rather than accepting what is called "partial authenticity". It is recalled that authenticity is a concept that intends to capture the genuine dimensions of a product or a person. Authenticity affects practically every element of daily life, from consumer products to tourism, art appreciation, and interpersonal relations (Newman & Smith, 2016). As a means to improve the general knowledge concerning this theory, researchers have faced the issue of precisely defining it. Inevitably, the resource that was unanimously perceived as most reliable was the general public and the studies conducted by scholars used structured interviews as the main research method. Responses obtained from participants served as a foundation for creating a set of judgements for characterizing and determining what makes one believe an object is truly authentic, called "Moral Authenticity" (Newman, 2019).

In order to conceptualize the subcomponents of authenticity, we will look at Lee's authenticity model of communication (2020). The three elements that constitute his model: focus on the integrity and reliability of a communicator, the purpose and the content of a message and the interaction between the communicator and the receptor; in this case, the influencer and the follower. Each element will be analyzed.

- Authenticity of source refers to veracity of the influencer (is the content creator indeed who he/she says he/she is?). As it was expected the source represents the creator of the message, who, in this case, is the social media influencer. This may also apply to new forms of computer-mediated communication, such as public comments on social media platforms, or public reviews on service's social media profiles or e-commerce platforms. Concerning the intention of buying a good, consumers often rely on other people's opinions, that have purchased their desired product. This interaction persuades the consumers into believing the reviewer is real and its experiences are genuine, especially if their profile seems

to belong to another person (such as having a profile picture, or disclosing personal information or preferences). Furthermore, it is argued that the authenticity of the source will remain a mere variable in the process of evaluating authenticity, as it is clear that more and more messages produced by artificial intelligence can exhibit human-like demeanors. For instance, a Google AI that makes a hair appointment, passing the Turing test. Moreover, alongside the rapid developments of technology, which complicates the judgments of consumers, there is another element that diffuses the lines that divide the computer-generated message from the ones created by humans: advanced editing programs, including productions that may have severe consequences, such as deep fakes.

- Authenticity of message refers to the degree of genuineness the product embodies (is the message reliable?). In this case, the product is the content (sponsored or non-sponsored) created by the influencer. When judging the authenticity of a certain message, followers apply to this process a personal set of values, thus, when the message matches their expectations regarding a certain encounter, it is easier to accept it as being genuine. When the information a viewer is receiving is incongruous with real life perceptions and previous experiences and gained knowledge about the characters and events presented, perceived authenticity will be, as a result, lowered.

- Authenticity of interaction refers to the way viewers feel while the communication processes occur and how they are implicated (is the interaction real?). Although the interaction between followers and influencers used to be unidirectional, nowadays, as social media platforms evolved and allowed their digital spaces to bring communities closer, the communication is bidirectional and both parties can interact with one another. This interaction converts the audience into an active participant in the communication process. A specific example is when a character from a movie or TV series is looking directly into the camera lense (as if directly looking into the eyes of the viewer), also known as breaking the fourth wall. The same concept of parasocial relationship may be applied to reading the banal statuses or seeing photos showing them in a natural condition, without extravagant clothing items or excessive make-up, posted by social media influencers. As it gives the false impression of closeness between the follower and the influencer, the former presumes the impression of a digital friendship that materializes through day-to-day activities posted by the latter. What is more, followers that engage in online conversations with influencers may encounter what is called “parasocial intimacy”.

Followers value authenticity and it has been demonstrated that flagrant sponsorships negatively affect their perception of an influencer (Hudders et al., 2020). A balance between sponsored and non-sponsored content is complicated to achieve, as variables are involved: on one hand, the success of the influencer, and, on the other hand, the attitude of the follower towards the influencer, including the possibility of him unfollowing the SMI.

A well-known method used in influencer endorsements is storytelling, in conjunction with autobiographical elements, with the purpose of increasing perceived authenticity, while maintaining the duality between their social media persona and their real-life persona. Moreover, another component that is valuable for influencers and needs to be considered is the balance between relatable and extravagant content. Most of the time, an influencer is required to appear genuine to his audience and post photographs or stories to which the followers would react positively, otherwise, the relationship they have can be damaged (Hudders et al., 2020).

Brand endorsements are regulated by two distinct models of authenticity: passionate authenticity and transparent authenticity. The former refers to the motives that drive influencers in pursuing this path. Passionate authenticity indicates that an authentic influencer is stimulated by inner passions, desires and interests, thus choosing a certain niche that he or she persuades. To put things into perspective, this strategy means that the influencer will create content solely for personal reasons, without external interests (Audrezet et al., 2020).

In order to maintain a social media influencer's integrity, a transparent authenticity approach will be related to a collection of methods for providing an honest and complete portrayal of brand endorsements, as well as personal perspectives. In regards to absolute authenticity, an influencer that chooses this path is obliged to refuse partnerships that do not match with their set of personal values and their view of the world (Audrezet et al., 2020).

## Methodology

The main focus of the research was to examine users' perspective on the authenticity of social media influencers, the way they define it, the importance of the role it plays when it comes to product endorsement and digital persona. A qualitative exploration was conducted, with the aim of contributing to previous research based on SMI's authenticity. Data acquired from participants was screened and analyzed in a qualitative manner, by correlating personal experiences to focus points of the research. Results were therefore presented in a straightforward and easy to understand approach.

The literature review of the study focuses on the perceived authenticity of social media influencers and its implications on follower's perspective regarding brand endorsements. The aim of the research is to contribute to Lee's authenticity model of communication that includes the authenticity of source, authenticity of message and authenticity of interactions. Furthermore, findings derived from this study may also contribute to a communication strategy calibrated to users' needs, desires and expectations when it comes to brand sponsorships. Naturally, the central research questions for this study is: *What role does authenticity play in the relationship between social media influencer and follower?*

In order to collect relevant information and to gain deep insight and understanding of how users perceive authenticity of influencers, the method considered most pertinent was the focus group. The reason behind this decision regarding the research method was the assumption that gathering data from participants will be more valuable than other options considered prior to this agreement.

As the main purpose of the study was to investigate users' perspective on authenticity in influencer marketing and its role in this field, it was believed that limitations may occur due to the method chosen for the conducted study, for instance, an online survey. It is clear that this method is useful when the research focuses on a larger audience, but, in this particular case, the study concentrated on the opinion of eight women. Furthermore, a focus group allows a scholar to examine facial expressions, body language and tone of voice, which is something that would not be possible if an online survey was conducted. What is more, although a set of questions was followed and created prior to the discussion with the participants, the possibility of asking further details if the topic requires it remains possible, or further exploration on a particular subject. All things considered, a focus group allows participants to interact with each other, exchange opinions and experiences, which may lead to important findings of the theme.

The main focus points that we have addressed during group discussion were: *what defines a social media influencer, general attitude towards social media influencers, understanding of influencer marketing practices, originality, credibility, parasocial interactions between followers and social media influencers, examples of authenticity and/or the lack of it regarding influencer-generated content.*

The length of the focus group was 65 minutes, which fits into the usual timeframe of one hour to one hour and a half. It took place on the 8th of April. After the focus group discussion, a short survey was created and sent to all participants, with the purpose of measuring data more carefully and arriving at more precise conclusions.

### ***Participants***

Eight women were selected, with ages between 22 and 25. The women were not tested before the research, but the selection was made based on the level of comfort and accessibility. The only criteria that was imposed was the familiarity with influencers and to follow or to have followed an influencer on a social media platform. Because the discussion had to respect the imposed safety measures and the amenity of the participants, certain factors were taken into consideration, such as distance and free time, thus the process took place online, via Zoom.

Participants were students, co-workers, friends and acquaintances. Considering the obstacles presented, it was desired to collect data from a diverse group, in this manner, educational background, personal interests, hobbies and online behaviour played important parts, although, in the end, the level of education was kept anonymous, as it was considered confidential and could potentially harm or negatively affect the participants' self confidence. For confidentiality reasons, in order to respect the privacy of the participants, only the given name, the age and the field of study or work were made public and mentioned in the research.

### **Summary of major findings and implications**

#### **Theme 1: Social media influencers and general attitude towards them**

The first topic addressed to the group was mainly focused on what defines a social media influencer. Each participant was following at least one SMI. The respondents were acquainted with the term that was used and contributed with valuable insights, that matched the descriptions presented in the theoretical part of the study: "influencers are people who, in one way or another, have come to have a very high following" (Andreea, 22), "an influencer is a person that a group can look at as a role model" (Stefania, 24) or "an influencer is a person who has clout and uses it either to make a transactions or to simply influence other people" (Jessica, 24).

Generally, respondents associate the term influencer with product endorsements and product advertisements: "I always associate influencers with advertising and I usually think of people who promote products on Instagram, but they can also promote a certain lifestyle" (Raluca, 23), although this phenomenon is linked to a negative perception, even making users choose not to follow them: "I follow very few Romanian influencers, but not the ones who promote products" (Raluca, 23), "I follow influencers not necessarily for product placement, but for other qualities. I would prefer them to approach different subjects and niches" (Roxana, 22). On the other hand, influencers can also be a source of pleasure or joy: "they are people that give me a good feeling" (Andreea, 22).

Purely from a professional perspective, the status of being an influencer suggests that there are implications from different fields, situated "somewhere between a normal job and a celebrity" (Adelina, 25). It is a known fact that a set of qualities would be required in order to become an influencer, however "the assets you have are different from those of a corporate job, but there is also an expectation to have a celebrity lifestyle" (Adelina, 25). In other words, being an influencer is a "mixed social status" (Andreea, 22) and a "combination between normal and famous people" (Adelina, 25). In opposition to these beliefs, when engaging in group discussions, there comes the possibility of rethinking old assumptions: "I usually make a distinction between influencers and celebrities. For me, influencers are not celebrities, but they can be considered" (Raluca, 23).

Moreover, besides obtaining a certain dual status, social media influencers have a social responsibility towards their followers, in terms of speech and recommended products, as one of their duties is to generate revenue for the brands they are promoting on social media profiles: "when you have a lot of people following you, you have to be much more careful about what you say, what you promote, because people can be very easily affected by these things, if it

goes against their beliefs or if they don't agree with certain things you say. You are much easier to be held accountable” (Andreea, 22).

After expanding our knowledge with reference to users’ perspective on social media influencers, their commitments and moral obligations, we wanted to explore other questions regarding the type of content they appreciate, the timeframe they have been following SMIs for and the platforms they prefer. It needs to be noted that, especially in the beginning of the group conversation, there was a prominent reluctance of admitting a person is following an influencer, which may justify the occasional negative attitude concerning them. The nature of this type of behaviour is justifiable, as there are cases of influencers showing off lavish lifestyles. According to the survey, 6 participants had a general neutral attitude regarding SMIs, one person had a positive attitude and one, a negative attitude.

When asked for how long they have been following influencers or how often they watch their content, responses were rather diverse: “I have been following influencers for about 10 years, on YouTube” (Maria, 23), “about 10 years as well, ever since I showed more interest for the Internet” (Jessica, 24), “(...) since I started high school” (Raluca, 23), “I started following influencers not too long ago” (Roxana, 22), “I started following influencers ever since they were not called that, but they were vloggers or youtubers. I think I was about 13 or 14 years old when I discovered YouTube” (Cristiana, 23).

An interesting observation was the comparison made between level of maturity and unfollowing influencers on social media: “I used to follow them in high school, but, after I left for university, I unfollowed all of them” (Raluca, 23). There was a noticeable tendency for participants to take a break from using social media and, afterwards, to unfollow influencers. As a participant has mentioned when elaborating an answer, a certain unease was perceived succeeding the aforementioned pause from online activities: “I used to follow them until I took a break from social media. The moment I returned, I deleted everything that suggested influencer marketing. If I watch the stories of an influencer, I will not use my personal account” (Adelina, 25). The reason behind these actions may be related to the frequency that influencer-generated content is being posted. As social media algorithms require these practices, in order to remain relevant for their audiences and collaborators, influencers need a constant flow of content produced on a regular basis. It may be compared to a regular office job: a person works every business day, but an influencer does not have a regular schedule and does not take pleasure in weekend days. As it has been shown, followers tend to become overwhelmed from the quantity of information they are receiving daily and struggle to find a balance between work, personal life and the dimension of social media life: “it is quite difficult for me to manage so much information that I come in contact with every day. I am interested in some content, but I am not in it for the whole deal” (Adelina, 25).

Respondents follow influencers on several platforms, such as Facebook, Instagram, YouTube and, recently, Tik Tok, both from Romania and other countries as well, such as the UK and USA. The reasons behind the decision to follow an influencer are inspiration, entertainment, relaxation, useful information and promotional codes: “I follow Maurice Munteanu because I appreciate his cultural references” (Andreea, 22), “I find useful and interesting information” (Maria, 23), “I am especially interested in comparing how Romanian influencers and international influencers see a certain field, such as make-up or travel” (Stefania, 24), “I like following them for advice” (Cristiana, 23), “I want to stay up to date with promotions, but I do not want to constantly see their content” (Adelina, 25). The responses underline a preference to follow social media influencers that have established a strong digital identity and create niche content.



## **Theme 2: Authenticity versus advertising**

Participants were asked to describe their personal view on authenticity and how they perceive it. Young people associate authenticity with personal style, which stimulates followers to easily identify an influencer's content, but also originality: "it is their personal brand" (Maria, 23), "some influencers have a certain *quelque chose* and always apply a personal touch" (Cristiana, 23). As an overall view, respondents found it difficult to strictly define authenticity, which underlines the subjective nature that it possesses.

The idea that influencers should post more personal content was recommended by respondents, as it may seem difficult for followers to associate authenticity with endorsers: "there is always a certain dose of performance" (Jessica, 24). Influencers should include non-commercial posts that do not necessarily suggest a pretended behaviour and simply act more natural: "everything is very curated" (Jessica, 24), while other opinions point out that it is important to "talk without a script and just be yourself" (Roxana, 22) and "expressing clearly and quite honestly what you think or feel most of the time" (Adelina, 25).

Young people are doubtful when it comes to authenticity and believe that even a genuine attitude has the chance to be perceived as being dishonest. Due to excessive use of editing programs, influencers tend to be labeled as deceptive, as they are able to curate the content they are posting on online platforms: "if you edit too much the information, the authenticity level decreases" (Adelina, 25).

Regarding social media platforms, influencers have the means for expressing themselves differently, depending on the one that is chosen. The level of perceived authenticity can increase if the medium is a video, whether it is a reel on Instagram or a YouTube video: "you show less emotions in an Instagram post, compared to a video" (Andreea, 22). From a marketing standpoint, it is expected to adapt your content, based on the platform and the targeted audience, but respondents find this practice to have both a positive and a negative side to it: "I would like the content to be more personalized and different depending on the platform, but if I am thinking from the influencer's perspective, it does not seem natural to have expectations of how he decides to share his content. An influencer can use various tricks that work on a platform, but at the same time, it's up to me to have expectations in that direction" (Adelina, 25). Other opinions stated the opposite: "the influencers I have in mind are consistent on all social media platforms and there are no significant differences" (Raluca, 23).

It should be mentioned that general themes approached by endorsers can enhance followers' perception of them. Respondents tend to trust influencers more if they approach social matters or if they engage in fundraisings, stating that many Romanian influencers: "predominantly use their platforms in order to promote products, without supporting any real charitable cause or educating their followers" (Cristiana, 23).

Concerning advertising, young people consider that product endorsements seem more natural and contribute positively to authenticity, when the implicated product matches the influencer's personal brand. It was mentioned that a social media influencer should carefully select the products and services they are promoting, in order to maintain their authenticity and credibility, but, most importantly, the identity they are transferring to the advertisement is supposed to be in harmony with the identity of the brand. In this sense, an example was presented: "a Romanian influencer was trying to promote tomato sauce, but she tried to make it seem glamorous" (Andreea, 22). Furthermore, another argument suggests that influencers should "believe in the products they are promoting" (Andreea, 22).

Young people appreciate honesty in the matter of product endorsements, which includes negative opinions about products: "it is important to have a sincere review if you did not like a product" (Raluca, 23). The pressure to be perceived as true to one's self is high, as one is expected to possess certain qualities, such as charisma, uniqueness, talent, creativity and versatility: "someone who puts on extremely strident make-up every day, one who chooses to



appear completely natural or one who embraces his or her own flaws and laughs about it” (Raluca, 23), “you need a dose of fun to attract your audience” (Andreea, 22). It was also mentioned that an influencer should not care to an extreme extent about the public’s opinion and should have an individualistic approach on social situations: “an authentic person is someone who is not scared of controversy” (Raluca, 23).

The next question addressed to participants was in regards to the correlation between advertisements and authenticity. As a general impression, young people assume that authenticity will decrease the moment an influencer decides to promote products as a transaction: “the fact that one gets to advertise detracts from the authenticity of an influencer” (Andreea, 22), although “it is difficult, because it is their job to advertise products” (Raluca, 23). Moreover, it was stated that the impact of advertising practices would be lower if the products would correspond to some extent to the influencer’s personal brand: “there would not be cognitive dissonance” (Raluca, 23), “it is important to promote products from their niche” (Roxana, 22). The aim for influencers is to have an insignificant contrast between their personal content and the content produced for commercial purposes. However, even too much variety can harm authenticity: “when there's an amalgam of products on your page, obviously you can't use them all” (Roxana, 23). Participants contributed with specific examples, such as when a make-up artist endorses make-up products, or when a dermatologist promotes skincare products.

Lack of creativity can lead to low levels of perceived authenticity. Respondents discussed the dullness revolving around influencer-generated content declaring that, in order to be persuasive, an influencer should customize their commercial content and be consistent with their social media posts: “the problem is that influencers do not know how to promote products and they have no creativity” (Cristiana, 23), “some influencers get inspired from Pinterest and copy what other people do” (Stefania, 24), “you can make a template with influencers’ advertisements” (Raluca, 23).

Relating to disclosure of sponsorship, comparatively to findings in the theoretical part of the study, it is regarded as lack of authenticity the omission of influencers not disclosing their material connections and brand sponsorships to their followers. What is more, people in fact are aware of the sponsored advertisement: “I find it disturbing and against the concept of authenticity when you speculate an influencer of having a sponsored ad, but does not disclose it as such” (Adelina, 25). Referencing the originality of influencers mentioned before in this paper, people have this impression based on the recollection of previous advertisements, comparing them to having a template or receiving the information that needs to be posted in the caption from the agencies. The insufficiency of legal regulations was proposed by respondents: “it does not seem to me that this part of marking the advertisement is reinforced for the time being, legally speaking” (Adelina, 25).

### **Theme 3: Examining perceptions of authenticity from a chronological perspective**

While agreeing that all participants are considered to be part of Generation Z, they have experienced the rise of social media platforms and the rise of influencer marketing. When it comes to the early days of social media channels, there were substantially more consumers than producers. The next topic that was discussed was the perception of authenticity regarding influencers that participants follow. It also needs to be remarked that young people started following the early YouTubers, then later became famous influencers and/or celebrities: “I used to follow influencers from the UK, such as Zoella and Tanya Burr” (Maria, 23). A few years ago, when the phenomenon of influencer marketing was not as well-known as today, YouTubers used to “share more things from their lives, even little secrets, like we would enter their private lives” (Maria, 23).

The authenticity was perceived from the genuineness the vloggers were projecting in their videos: “there was a group of vloggers living in London and you could see their lives from each of their perspectives, because they were also making videos together” (Cristiana, 23). As followers grow up and become adults, their interests change and they do not enjoy the things they used to like when they were teenagers: “I do not watch their videos anymore, only when I am feeling nostalgic” (Cristiana, 23). Concerning the chronological aspect of the theme, people find that the abundance of information on media channels comes with negative parts as well, while the vloggers they used to follow slowly lose their authenticity: “influencers focus too much on the commercial aspect of creating content” (Cristiana, 23), while “endorsing too many products, instead of showing us their normal, day-to-day lives” (Maria, 23). In opposition to these personal experiences, a counter argument was made: “to this day, I am not sure their daily vlogs were authentic. Clearly, one can choose the frames they put in video, or, for instance, edit and delete the sequence in which they got mad for breaking a glass” (Adelina, 25).

Young people become overwhelmed with the amount of information they see or hear everyday. Despite the fact that they follow influencers for the usefulness of their content, it is remarked that social media platforms have positively contributed to the capitalist society that we are living in, by implementing advertisements and, recently, generating e-commerce sales: “there are too many advertisements, so I started using less social media, because 2 or 3 hours spent on Instagram were a waste of my time” (Maria, 23), “I have not been very active on Instagram lately, so I have forgotten about influencers, although I am still following them” (Stefania, 24). As it can be observed, the amount of advertisements a follower receives daily can have a negative impact on influencer marketing.

Nowadays, with the help of the Internet, people have access to almost any information they would need. Besides this, they also have the opportunity to order a product from almost anywhere in the world. Generally, one would perceive these favourable circumstances as something positive, but it can also confuse people with their choices. Respondents mention that advertising used to help them in making choices when purchasing a product, but, as the market increased, people’s attention was pulled into many directions: “everyone advertises several products and somehow I do not know what to choose. I think there is no product that is not being promoted by someone” (Maria, 23). People were able to filter the products or services they were interested in more easily: “it used to be simple - you would hear about 2 or 3 product that you knew were efficient, the majority of influencers would endorse them and, in the end, the product were actually good and useful” (Maria, 23). Respondents affirm that they are deprived from the excitement a new product would bring after the purchase, because they have already read too many opinions regarding it.

In spite of appreciating the influencer and his interests, followers tend to perceive them as betraying their principles and morals, if they endorse products that may suggest unhealthy lifestyles, or if the products are not in harmony with the influencer’s personal brand: “I like Maurice Munteanu, but I started disagreeing with him lately, because he advertises weight loss tea” (Andreea, 22).

#### **Theme 4: Examples of authenticity and/or the lack of it in regards to influencer-generated content**

The last part of the discussion was focused on specific examples of an influencer expressing authenticity or the lack of it. The comments were made based on personal views, beliefs or experiences. Respondents appreciate the charisma and light-spirited state of influencers when it comes to advertising products and, more so, when influencers think outside the box and do not play into the norms: “I am thinking of an American girl I follow who worked for BuzzFeed and is now a vlogger. She bought all the lipsticks she could find in a store and

started doing various things with them at home, which I find much more attractive in terms of content, than taking each lipstick and doing a super plastic review” (Andreea, 22). It was also mentioned that the medium an influencer chooses for a product endorsement can help them be more creative, highlighting the fact that, for instance, a video can seem more playful rather than a photo posted in Instagram.

Mainly two unfavorable cases were remarked by respondents: Plush Bio and, a more recent one, the RetroFuture Babe Valentine’s day campaign. We will offer some background information regarding these two situations. Plush Bio is a luxury cosmetic brand, created by Ioana Marinescu, a Romanian pharmacist, and aggressively promoted by a lot of influencers and celebrities. In spring 2020, a Facebook group was created, with over 135K members. Hundreds of girls have confessed the skin issues that the Plush Bio cosmetic products have provoked. The issue became popular on national television as well, especially after a few consumers sued the brand. Some influencers have apologized and stopped the collaboration with the brand, but some have not. It is believed that some of them were paid with tens of thousands of euros. RetroFuture Babe is a brand owned by Romanian influencer, Alina Ceusan. This February, with the occasion of Valentine’s day, they have created a special themed campaign, starring Alina and Christina Ich, another Romanian influencer. The two appear in a sexual manner, displaying obvious affection. It also needs to be noted that they both are two heterosexual women, and each has one child. They were accused by their audience of practicing queerbaiting.

Especially in the Plush Bio case that reached mainstream media and that had a negative effect on other people, followers will react accordingly, with a result of decreased authenticity: “people had adverse reactions and have claimed financial compensation. From a legal standpoint, nothing has happened, and yet Plush Bio products continue to be advertised” (Andreea, 22). Moreover, followers pay attention to the way a product is presented to the audience and the advertisement should feel natural, which is the reason why influencers are expected to actually use the products they are endorsing, as it is one of the methods to be trusted by followers: “it seemed dubious to me from the beginning, when I saw people with unopened products, they even looked sealed, and they advertised them, saying that they use them and are good” (Stefania, 24), “Adelina Pestrițu promoted these products a lot and praised them and said that she uses them all the time. After the group appeared on Facebook, where all the girls complained, it seems to me that she no longer said anything. Everything was covered up” (Maria, 23).

Regarding the RetroFuture Babe campaign, it was labeled as a lack of authenticity, particularly for the way the influencers have responded to the queerbaiting accusations: “they were put up against the wall, but none of them came up with arguments for the ideas behind the concept presented in the campaign” (Adelina 25). From a business standpoint, followers recognized the advertising value, even though the general perception was negative and the lack of authenticity was apparent for audiences: “they seemed devoid of any sense of reality. They decided to use the images only for commercial use. Their reaction at the time of the scandal was even worse. I do not deny the value of this scheme in terms of advertising” (Andreea, 22). Followers appreciate when influencers take responsibility for their words and actions, which can increase the level of authenticity.

As it was previously suggested, respondents appreciate influencer-generated content that also contains personal experiences and is not preponderantly filled with sponsored advertisements: “I thought of an American youtuber, Jenn Im, and, at a time I know she lost a lot of followers, she had her wedding and did a series of videos. The wedding was beautiful, but there were commercials every 5 minutes or less. Everything was sponsored, from the morning the bride was getting ready, to the honeymoon and, as a viewer, it felt unpleasant” (Jessica, 24). As many participants mentioned, creativity is an important element to include in

social media posts in order to boost authenticity. In this manner, various answers were given: “influencers can look for new content ideas or formats that they can explore on social media platforms, bringing them closer to their fans” (Jessica, 24), as well as specific examples that could be included, such as “showing us empty products, products they would buy again or not” (Stefania, 24). According to these answers, it is clear that followers have a positive attitude towards influencers that actively use and consume the products they are receiving in PR packages (or that they have personally purchased), compared to showing new, unopened and sealed products, as there would be no proper evidence that the product is able to achieve what is claims in the advertisement. Therefore, an influencer is a more efficient advertising channel compared to the traditional ones, as testimonials and open discussions can be introduced to targeted audiences.

Furthermore, followers value emotions and feelings, for instance: “talking openly and expressing your feeling as they come” (Roxana, 22), in conjunction with moments spent with family, which can make the follower feel closer to the influencer: “the authenticity comes precisely from the fact that she (Alina Ceușan) was not just trying to film a table that looked aesthetically pleasing, but, on the contrary, she was at the grandparents’ house, they spoke with their traditional accent and there was no attempt there to beautify something” (Adelina, 25). Followers also value the optimism and positivity that influencers created through their content: “Sânziana Sooper has a style of her own and always sends me a positive vibe. She is always happy and seems to have no problem” (Maria, 23). Lastly, respondents argued the power that confidence, personal integrity and staying true to yourself hold: “Ruxy Ghimp, who, even if she moved to Romania, does not try to hide her Moldovan accent” (Andreea, 23).

Respondents identified a difference in the manner that Romanian influencers are expressing themselves, compared to international influencers. In the sense that courage is valued highly by viewers, one of the participants stated the importance of having fun on social media and not taking oneself seriously: “the people I follow do things like playing cards in the bathtub, surfing while wearing high heels or dancing with their 90-year-old grandmother” (Raluca, 23). Followers value courage, wishing they could mirror the charisma they are perceiving in the influencers they like, while highlighting the contrast between Romania and other international countries, in regards to physical aspect, such as body hair or eccentric make-up.

### **Results - Users’ perspective in relation to authenticity**

The importance of authenticity was highlighted numerous times by the respondents, suggesting that it is one of the criteria that the decision of following an influencer is based on, more so than aesthetic reasons, entertainment value, advice, or promotional codes.

Findings show that perceived authenticity is either increased or decreased not only because of the products the influencers choose to endorse, but also because of how they do it, how it matches their personal style, how they respond to negative comments, and how much sponsored content they produce. The results derived from analyzing the data provided will be filtered and sorted through Lee’s model of authenticity.

Starting with the first concept addressed by Lee (2020) in his model, authenticity of source, in this case, the authenticity of the influencer will decrease proportionally to the number of paid sponsorships. While respondents acknowledge that it is the influencer’s job to advertise products for a living, the perception of their authenticity will still decline, so it was recognized a need for finding a balance between paid sponsorships and non-commercial content. The action of advertising will detract from an influencer’s authenticity. Although it is imprecise and there is no conclusion in regards to a certain percentage the influencers should keep in mind, it is an aspect that should be considered when creating content, may it be a personal

resolution or not. It has been mentioned that followers become overwhelmed by the quantity of information they are receiving daily on communication channels.

Respondents appreciate personal content, as it can be perceived as an act of escapism from daily responsibilities. Influencers that focus too much on the commercial aspect of content creating will be seen as less genuine. Followers prefer day-to-day posts that are relatable to the general public.

Results are aligned with the theoretical aspects of the present study. As it was mentioned in the literature section, respondents answered that the excessive use of editing programs can lead to the perception that the influencer is dishonest, even leading to negative effects on young audiences, especially when the influencer is not aware of the consequences their action may have. Their approach should be more natural, particularly concerning female influencers, as females are subjected to stereotyping as a result of the reinforcement of gender roles and expectations. Advertisements are actively contributing to this, thus they are directly linked to dangerous effects on women, which can lead to negative body image, to lack of confidence, to increase in weight concern and to the development of eating disorders.

Otherwise stated, false representations of reality, unreal ideas of beauty and standards almost impossible to reach are being responsible for fabricating ideas about female behaviour and appearance, but, above all, for the way women are treated and judged by members of society.

An influencer was perceived as more authentic if they presented their negative opinions of products and it was underlined the importance of having sincere reviews, as well as promoting products from one's area of expertise, whether it is sports, travel, food, make-up or skincare. Furthermore, respondents declared that advertisements used to have a useful quality for them, but, as the field of influencer marketing kept growing, the variety of the product advertised was enormous, making followers confused and overwhelmed in regards to their available choices. It was confirmed that too much diversity can harm perceived authenticity.

Respondents agree that being an influencer is difficult, as the pressure to be perceived as truly authentic is high and a certain set of qualities and characteristics is required. Besides the professional assets an influencer is expected to possess, they should also have charisma, originality, a sense of style, uniqueness, creativity, versatility and be consistent with their posts. Although some respondents said that they prefer an individualistic approach on social situations, referring to the fact that an influencer should always said what is on their mind and not be afraid of confrontation, some have said that the bigger one's audience is, the more they have to be careful with what they claim to be true, as they can easily be held accountable, if something they say goes against someone's beliefs. Respondents have also stated that they appreciate a dose of fun included in influencer-generated posts, as it captures their attention.

Moreover, lack of creativity can lead to a low level of authenticity, hence this aspect is essential in the creative processes that brand endorsements require. Authenticity was generally compared to personal style. Followers prefer influencers to create their own set of indicators, as it was believed that a sponsored post should be effortlessly identified with its original creator.

Influencers that approach social matters and that are actively involved in doing charity work, or educating their followers of specific subjects or topics will be regarded as more authentic than the ones that do not engage in these activities.

Depending on the platform the influencer is active on, the level of authenticity may vary. They have the opportunity to express more emotions on platforms such as Tik Tok or YouTube, as the video format allows them to freely express their emotions. Nowadays, videos can be posted on Instagram as well (IGTV or reels), which can benefit marketers and influencers.

Moving on to the authenticity of message, both the message and the source are perceived as inauthentic if the identity transferred to the advertisement is not in harmony with

the identity of the brand that is advertised. Even more, respondents have claimed that influencers that promote products that do not ensure a healthy lifestyle, such as vapes or weight loss teas, will have lower perceived authenticity. The specific example referred by several respondents was concerning Plush Bio skincare products, which resulted in adverse reactions for many consumers and, eventually, a lawsuit. Respondents have affirmed that they ceased to follow influencers that promoted that type of products, in particular the ones that showed little to no empathy or did not take responsibility for their own actions.

Concerning authenticity of interactions, from a linear perspective, having in mind that several respondents were following influencers for a long time, since their adolescence, authenticity was derived from the genuineness the vloggers were projecting, as if sharing secrets with their audiences or allowing them to enter their private lives.

An example proposed and debated by the respondents was the RetroFuture Babe Valentine's day campaign. When clashing with queerbaiting accusations, the influencers that were involved in the creative process of the advertising campaign did not take ownership or responsibility for their actions and no real arguments were presented in order to support the idea behind the campaign. Furthermore, the content creators blamed their followers for not understanding the message they aimed to transmit and, even more, allegedly accusing them for not allowing them to express freely, which was not the case. This particular series of events was categorized as a decline of perceived authenticity.

Furthermore, some specific methods of boosting the level of authenticity were suggested by the respondents, such as exploring new media formats, expressing negative opinions when it comes to reviewing products or services, showing empty products (these actions may be applied to beauty products) and staying true to one's self. The latter approach may be depicted by talking with a traditional accent, posting photos or videos with members of the family or even showing traditional meals enjoyed with their loved ones. These practices can be taken as examples by social media influencers in order to further connect with their audiences.

## **Conclusions**

Perceptions of authenticity play an active role in decision making processes of followers across several areas of activity. This study encompasses various associations created between diverse literature streams by empirically determining the significant role authenticity performs in connecting social media influencer practices to advertising purposes.

Compared to previous research where participants expressed a strong aspiration in becoming a social media influencer (Balaban & Mustatea, 2019), respondents did not seem to show a desire in pursuing a career path as a SMI, but rather, at least in the beginning of the discussion, show animosity towards them. Of course, this study has an exploratory approach, including a relatively small sample, so the results cannot be applied to a majority of people. Personal experiences play important roles in creating these perceptions.

When an influencer creates something for external validation or financial recompensation, not from a genuine commitment to his or her content, or joy of creating something new into the world, the alteration in a follower's perception of his or her will certainly occur. Content created by an influencer that cares little about what they produce and only has the purpose of maximizing profit will be perceived by followers as lacking moral authenticity (Newman, 2019).

This study emphasizes the need for authenticity the consumers have, not only from brands or products, but also from social media influencers. Authenticity acts as a supportive ally in regards to general attitudes towards influencer marketing as a practice, to brand awareness and to overall aspect of a product's qualities (Audrezet et al., 2020).



The findings in this study may provide specific guidelines for marketers and endorsers, in order to enhance effective communication and to increase the level of perceived authenticity.

### Limitations and directions for future research

In this study, limitations include the gender of the participants, as they were all females, and their age, as they were between 22 and 25 years. It would be interesting to see further research including male respondents and how they perceive authenticity. It may be possible that males have a different approach on this concept than females, but it remains to be studied by scholars.

A direction for future research, as it was just briefly touched upon in this particular paper, would be to have a clearer view on the balance between sponsored and non-sponsored influencer-generated posts, if it is one the factors that determine a person to cease following social media influencers and the implications it may have on advertising.

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Section 3  
**THE BRIDGE BETWEEN HISTORY AND SOCIETY**

**THE ROLE OF THE HISTORICAL FACTOR AS AN ARGUMENT IN  
HIGHLIGHTING THE TERRITORIAL STRUCTURE OF THE  
HUEDIN LAND**

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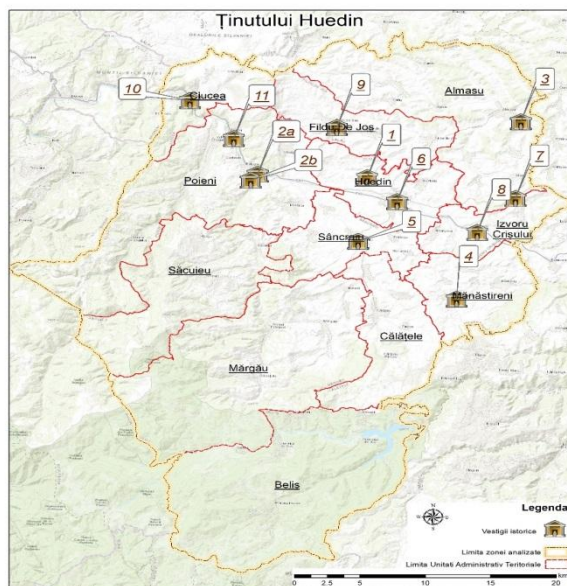
**Abstract:** *The Huedin region has an archaeological, cultural and ethnographic value which gives it a distinct place compared to the other lands. From a chronological analysis of the historical events which led to the individualization of the Huedin land there were used the cartographic method, the case study, the observation in the land, bibliographic documentary and GIS (visibility analysis). All these methods reflected the impact of the historical factor to the evolution, individualization, development and the division of the Huedin land. The objectives of the research aim to highlight the Romanian identity present in the area, reflected in various writings of representative ideological movements or contemporary perceptions. The population present in this geographical region has roots in the Paleolithic era and ancient historical relics like the castle of Bologa Rescolum or Gilău which still can be found today. During the Middle Ages The author Anonimus mentioned in the majestic work Gesta Hungarorum the existence of Gelu's kingdom in this area when the Hungarians invaded in the IX'th century.*

**Key words:** Bologa-Rescolum, voievodeship, land.




**Istoricul cercetării**










Dovezi ale existenței locuitorilor în regiunea Huedinului sunt notate în cronică scrisă în latinește pe la anul 1200 de un „notar” anonim al regelui Bela al Ungariei—cronicar desemnat în istoriografie cu numele de „Anonymus” —document capital pentru istoria noastră, fiind bazat probabil pe o cronică anterioară, povestește cum ungurii, pătrunzând în Transilvania de la vest către est, au dat de trei voievodate locuite de români și de slavi conduse de Glad, Menumorut și Gelou (Djuvara, 2002). Factorii identității naționale sunt reprezentați de originea latină, constituind și în prezent o „insulă latină într-o mare slavă”, de limba română care face parte din familia limbilor romanice, de teritoriu sau spațiul „carpato-danubino-pontic”, religia ortodoxă predominantă și de folclorul autentic. Dintre autori care au abordat în diverse monografii aspecte istorice din Ținutul Huedin, trebuie menționat prof. Șteiu Nicolae care a redactat 18 monografii ale localităților din ținutul, abordând cu spirit bine documentat, cadrul natural, resursele și activitățile economice. Precum și aspectele istorice, specificul etnic și confesional al localităților. O mare importanță a acordat-o repertoriului istorico-etnografic și cultural al zonei, ex. Fildurile-frumusețe, istorie și artă populară (2007), Bologa-pe treptele istoriei (2008), Mărișel-la centenarul marii uniri, oameni, fapte și folclor (2018) și Mărișel, File

de geografie, istorie și folclor (2000), Beliș-vatră străbună (2002), De sufletul Iancului (1992), Poieni. Spațiu, istorie și spiritualitate (2007), Splendoarea Gilăului (2004) -realizând culegeri de date istorice, etnografice, grefate pe cadrul geografic al Ținutului Huedin sau autorul Lechințan V., (2006) monografia Călățele.



**Fig.1.Hartă vestigii istorice și culturale din Ținutul Huedin**

Nr. pe harta	Descriere vestigii istorice	Descriere vestigii istorice
1.	Cetatea de pământ din Bolic, localizată în cătunul Cetatea Veche (Bolic) aparținător orașului Huedin, perioada Hallstattiană 	2 a) Castrul roman, <u>Resculum</u> , Bologna 
2b).	b) Cetatea de piatră <u>Sebesvár</u> , Bologna	
3.	Cetatea Almașu	
4.	Biserica Reformată-Calvină din Mănăstireni sec. al XIII-lea	5.Biserica Reformată din Sâncraiu, sec. al XIII-lea

		
6.	6.Biserica Reformată, Huedin, sec XIII-lea 	7.Biserica ortodoxă "Catedrala Moților " Huedin 
8.	Cetatea Ciorii sau Varjúvár, sat Stana, com Almaș, din 1910 	9.Biserica din Izvoru Crișului datează din sec. al XIV-lea, 1931 
10.	Biserica de lemn din Fildu de Sus, anul 1727 	12.Casa memorială „Octavian Goga,, Ciucea anul1900 
12.	Muzeul Etnografic din satul Bucea, com Poieni, 2020.	

**Fig. 2. Obiective arheologice, religioase și culturale din Ținutul Huedin.**

Primul gânditor român care s-a ocupat de identitatea românilor este Dimitrie Cantemir în *Descripțio Moldaviae* și în *Hronicul vechimii romano-moldo-vlahilor*. În aceste documente savantul roman se referă la câțiva factori identitari importanți, precum: originea (etnogeneza) teritoriul, limba, viața spirituală, mentalitățile etc. (Cantemir, 2017). Preocupări privind latinitatea limbii și unitatea românilor au avut loc în sec.XVIII-lea la reprezentanții Școlii Ardelene, Petru Maior, Samuil Micu, Gheorghe Șincai și Ioan Budai-Deleanu. Aceștia au elaborat petiția *Supplex Libellus Valachorum* împăratului Leopold al II-lea, prin care cereau ca națiunea română să fie recunoscută ca parte constitutivă a Principatului Transilvaniei. Ca acțiuni notabile de menționat este introducerea grafiei latine în locul celei chirilice și au tipărit

primul dicționar modern cvadrilingv *Lexiconul de la Buda* din 1825 (latină, maghiară germană și română) (Boari, 2019, p.24). În sec. XIX-lea, problema identității românilor a fost asumată de două grupări importante: pașoptiștii și junimiștii, iar în anul 1840 a apărut revista *Dacia* literară. După Marea Unire din 1918 și în perioada interbelică se înregistrează numeroase scrieri privind identitatea națională, românitatea, specificul național la autori precum Dimitrie Gusti, Lucian Blaga, Nicolae Iorga, Constantin Noica etc. În perioada comunistă, problemele legate de identitate au fost puternic „ideologizate” (Boari, 2019, p. 27). Putem dovedi pe bază de argumente documentare, că problema identității naționale a populației românești a fost susținută intens de personalități de seamă ale neamului românesc și a fost bine delimitat conceptual de *identitate colectivă* și *identitate națională*.

### **Metodologie**

Obiectivele principale ale studiului au în vedere: evidențierea identității românești din această zonă reflectată în diverse documente, impactul pe care factorul istoric l-a avut în individualizarea, evoluția, afirmarea și devenirea Ținutului Huedin, evidențierea specificului natural, social și administrativ al regiunii și valorificarea turistică și economică. Metodele de investigație au presupus: documentarea bibliografică, observația și identificarea în teren, comparația, ancheta socio-istorică prin intermediul chestionarelor, analiza cartografică. Acestea au fost aplicate și prin participarea la ateliere tematice cultural-istorice cu diferite ocazii. Toate aceste metode au reflectat impactul pe care factorii istorici l-au avut în individualizarea, evoluția, afirmarea și devenirea specificului local a regiunii analizate. Pentru analiza cronologică a evenimentelor istorice care s-au desfășurat în acest teritoriu și au dus la individualizarea Ținutului Huedinului s-a utilizat, metoda cartografică, a studiului de caz, observația (directă – în teren și indirectă), documentarea bibliografică și analiza GIS (de vizibilitate).

### **Dovezi ale continuității poporului român în spațiul Ținutului Huedin, aspecte istorice**

Factorii identității naționale sunt reprezentați de originea latină, constituind o „insulă latină într-o mare slavă”, de limba română care face parte din limbile romanice. De spațiul „carpato-danubino-pontic”, religia ortodoxă predominant și folclorul autentic. Spațiul montan carpatic are rolul de citadelă naturală unde populația s-a retras în vremuri neprielnice (Comnene, 1919). Aspect bine argumentat și de Simion Mehedinți „fără Carpați n-ar exista un neam și un stat românesc” (Josan, 2002, p.143).

Prin analiza unităților de relief se observă o îmbinare organică, care funcționează ca un sistem spațial, flexibil, polarizant și disipativ, fiind observate fluxuri convergente și divergente de energie, devenind astfel un organism spațial (Vallega, 1995). Consecințele directe ale modelului spațial sunt determinate de importanța unităților de relief, fiind un „nucleu geografic și identitar”. Vasilescu V., (2006) afirmă că țările și ținuturile s-au format în aceeași perioadă, înaintea întemeierii voievodatelor, „țările de ținut precum și ținuturile au fost alcătuite din uniuni de sate care mai târziu au format voievodatele”, iar acestea „la un loc alcătuiau Spațiul Carpatic”. În primele documente, românii (valahii) sunt localizați în „păduri”, în ținuturi împădurite, fiindcă acolo în dumbrăvi înconjurată de codri deși se adăposteau mai lesne împotriva călărimii năvălitorilor (Djuvara, 2002, p.11).

### **Cercetări istorice**

La începutul secolului al XX-lea problematica cetăților a fost și în atenția lui Pasteiner I. și a lui Marțian, L., ultimul închegând un repertoriu al siturilor arheologice din Transilvania. Fortificațiile medievale au fost studiate de cercetătorii: L. Cibițescu, G. Ferenczi și I. Ferenczi, E. Fugedi, Gy. Gyorffy, R. R. Heitel, V. Gr. Ionescu, Th. Năgler, M. Rusu. Istoriografia maghiară a acordat o mare atenție cercetării fortificațiilor și sistemelor de graniță, mai ales

datorită lucrărilor lui Gyorffy. Gy., în articolul publicat în anul 1976, face o analiză asupra începuturilor organizării comitatelor în regatul arpadian (Țiplic, 2005, p.6). De asemenea trebuie menționată lucrarea lui Pascu, Șt., Voievodatul Transilvaniei, volumul II, un capitol analizează fortificațiile din Transilvania, fiind identificată cu momentul nașterii națiunii ultrasilvanum. Iar teoria pînzelor de populație a lui Panaitescu (1990, p.26) explică coexistența într-un teritoriu geografic restrâns a mai multor grupuri etnice și interacțiunea culturală.

Termenul de **castrum** este prezent în diplomația arpadiană, reprezentând o construcție definită de cuvîntul cetate. Începînd cu sec. al XIV-lea apare un nou termen: *castellum*, care desemnează o construcție ce avea și alte facilități (în special legate de locuire) spre deosebire de castrum. Definiția pentru *castrum*: cetate este dată de Rusu (1980): ca spațiu restrâns, protejat de fortificații, propriu evului mediu și epocii premoderne.

Pentru a face o deosebire între fortificațiile specifice evului mediu timpuriu și cele aparținînd finalului perioadei este utilizată denumirea de **castru** pentru fortificațiile de pămînt și lemn și **cetate** pentru cele construite din piatră legată cu mortar începînd cu sec. al XV-lea. Apariția fortificațiilor, a centrelor întărite în spațiul transilvan indică o fază importantă în evoluția regiunii. Ridicarea de fortificații la începuturile evului mediu a fost apreciată în istoriografie drept un criteriu important pentru evaluarea puterii și afirmării unei organizații statale. Granița a reprezentat încă din perioada evului mediu un element fundamental al sistemului politico-militar, o delimitare a autorității și competenței unui stat simbolizat de șef/rege, o barieră de protecționism economic și cultural. Granița, în mentalitatea medievală, a reprezentat o limită de demarcație naturală, cum ar fi un curs de apă, un lanț muntos fiind determinată de unele reminiscențe antice. Întreaga zonă deține numeroase vestigii istorice, iar anumite toponime indică rolul avut în viața comunităților ex. Cetate, Dealu Cetății, Măgura Cetății, Cetatea de pămînt, sau Cetatea Lupilor, atestate la Huedin, Bicălatu sau Bedeciu (.RepCj 54-55, 232).

### **Rolul cetăților și castrelor de apărare în menținerea identității Ținutului Huedin**

Ținutul Huedinului este una dintre cele mai interesante zone istorico-etnografice ale Transilvaniei, fiind prezente aici o serie de monumente istorice reprezentative care pot oferi resursele necesare dezvoltării turismului. Cele mai vechi documente privind istoria Transilvaniei medievale datează de la începutul sec. al-X-lea, când a început procesul destrămării obștiilor țăranești și apariția organizărilor feudale sub forma cnezatelor și a voievodatelor, adevărate uniuni pentru apărarea în comun a teritoriului (Bernea, 2006, p. 50). Spațiul geografic al Transilvaniei a favorizat ridicarea de fortificații, regiunea fiind un bastion natural folosită strategic.

Una din cele mai vechi cetăți în jurul căreia s-a conturat nucleul inițial al vechiului Ținut al Huedin a fost *Cetatea de pămînt de la Bolic*, aflată în cătunul Cetatea Veche (Bolic) aparținător orașului Huedin, din perioada Hallstattiană, fiind una din cele mai întinse fortificații din acea perioadă. Cetatea este localizată pe un platou cu dimensiunile de cca. 450 x 100 m, demarcată de val de pămînt și șanț de apărare dublu pe latura SV.

Una dintre cele mai importante cetăți de piatră este *Cetatea Bologa*, din com. Poieni, la confluența Crișului Repede cu Săcuieu, fiind construită peste ruinele unui castru roman. Pe lângă castru, pe malul opus al râului Henț se află o fortăreață, menționată pentru timp de mai multe secole ca *Sebesvár*, apărînd pe hărțile Evului Mediu. Cetatea Bologa avea rolul de-a ajuta localnicii să supravegheze drumul Văii Crișului Repede fiind folosită fără întrerupere din sec. al XIV-lea, până în sec al XVIII-lea. Începuturile sale se plasează probabil înainte de anul 1.317, prima mențiune documentară după A.A., Rusu, datează din anul 1.319 (DIR.CXIV, nr. 359, p.319) sub denumirea de *Sebuswar*. Apare nominalizată cu diverse nume, cum ar fi Sepuswar din 1324 Sebeswar -1329, Sebeswar alio nomine Hunyadwar-1398, Castrum regis Sebes-1393, Castrum regis Hunyad-1397, Sebes Varallya –1760 (Rusu, A. A., Castelarea, 289,

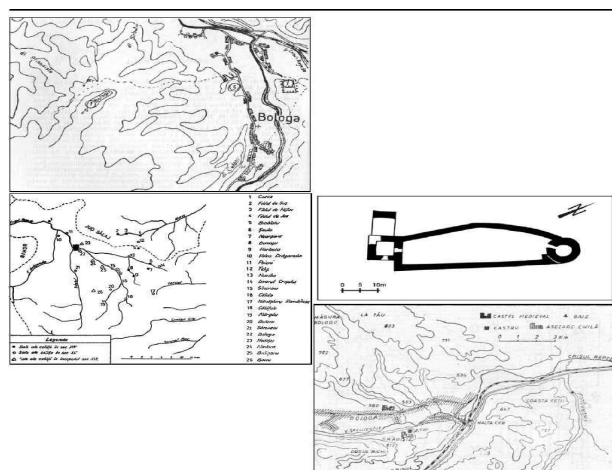


nota 1,504). Prin ridicarea cetății, Carol Robert de Anjou a deschis un drum strategic către interiorul Transilvaniei, paralel cu vechiul și mai circulatul „*drum al sării*”, care străbătea jud. Sălaj.



**Fig.3,4. Cetatea Veche Huedin. Fortificația Hallstattiană figurează pe Lista Monumentelor Istorice a județului Cluj (cod CJ-I-s-A-07073), cât și în Repertoriul Arheologic Național (RAN).**

Web: [ran.cimec.ro](http://ran.cimec.ro)



**Fig.5. Secțiuni prin donjon, prelucrare după Arh. Direcției -Monumentelor Budapesta, amenajări interior donjon după Rusu, 2005**

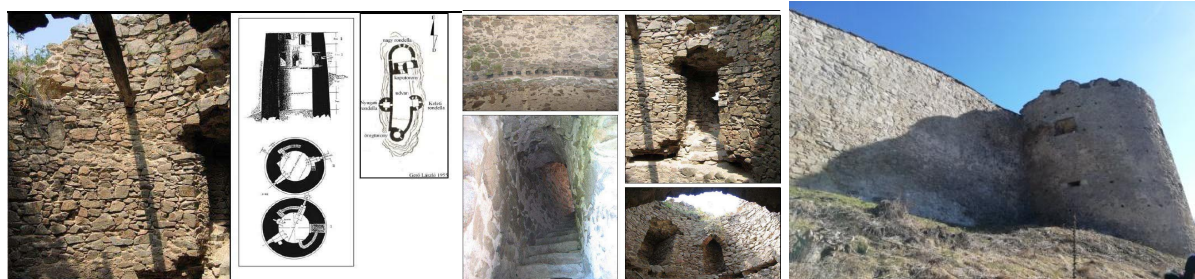
A câștigat importanță în secolul XVII, când otomanii au cucerit Oradea, împiedicând colectarea taxelor. Sultanul a ordonat demolarea ei, dar ordinul nu a fost dus la îndeplinire. A fost distrusă însă mai târziu prin explozie, de ostașii Imperiului Habsburgic (lobonți). Totuși, turnul și o mare parte din ziduri au rămas în picioare, timpul învingând doar detaliile din lemn ale acestuia (Bernea, 2006, p. 51). Menționarea în 1377 a unei vămi în preajma cetății, demonstrează utilitatea drumului pentru scopuri comerciale după care a fost mutat la Huedin, conform transformării localității dintr-o villa într-un oppidum (Rusu, 1987, p. 404). Prezența unei fortificații din piatră, de formă triunghiulară la confluența Crișului Repede cu Valea Drăganului subliniază valoarea militară a acestei căi de pătrundere în Transilvania. Fortificația a fost utilizată curent până în sec. XVIII-lea, suferind numeroase transformări, adăugiri și distrugerii. În veacul al XIV-lea, cetatea aparține *cetăților cu donjon numit Appafi* de 22 m.

Primul castellan cunoscut din documentele vremii este Desideriu de Elephant, originar din Ungaria de Nord, care în jurul anului 1320 își alcătuiește unul dintre cele mai întinse domenii din Transilvania epocii. Funcția a fost preluată curând după 1331 de un alt Desideriu, de data aceasta de Losonc. Din 1350 castellan este Ubul iar din 1359 Andrei, fiul lui Desideriu. Ultimul castellan cunoscut, atestat în 1377, este Sophornik probabil un german de origine socială mai modestă, sunt atestați și vice castelani în funcție și diferiți slujbași. În 1398 cetatea revine familiei Losonci-Bánffy, iar între 1399-1410 lui Mircea cel Bătrân. La sfârșitul intervalului ea revine pentru o scurtă perioadă regelui. Din 1424 rămâne definitiv în posesia

familiei Bánffy. La mijlocul secolului XX turnul și-a pierdut acoperișul, tot ceea ce a mai rămas este piatră. Cu ziduri mărețe și cu două turnuri rămase în picioare, Cetatea medievală Bologa amintește și astăzi de importanța ei de odinioară, fiind spectaculoasă în exterior și grandioasă în interior (Chirilă și Gudea, 1973 ).

În primele decenii ale secolului al XIV-lea, vama de pe drumul dinspre Oradea era situată în apropierea cetății, apoi mutată la Huedin. Ea constituia o sursă de venit pentru cetate, alături de dări (darea oilor) și de spălarea aurului. Materialul folosit la construcție provine din albia râurilor aflate în apropiere, sau resturi din castrul roman. Castrul deținea domenii, cedate de regele Sigismund de Luxemburg în sec. XV-lea, nobilimii. Constituirea domeniului cetății s-a realizat cu acceptul regalității, localitățile aparținătoare nu dispun de o unitate teritorială solidă, fiind localizate de-a lungul unor râuri având prin urmare un control mai eficient (Rusu, 1987, p. 407).

Cetatea de la Bologa a fost parțial distrusă de habsburgi după războiul curuților, pentru a nu le servi acestora drept refugiu în viitor, parțial s-a dărâmat natural. Se presupune că la început ar fi funcționat doar donjonul, înconjurat de un val și de un șanț de pământ, abia mai apoi fiindu-i adăugată cortina de piatră. Obiectivul este important pentru cercetare deoarece a suferit puține modificări în timp în ceea ce privește suprafața de teren ocupată și continuitatea unor elemente (fântâna, grajdul, temnița). Grijdul mai funcționa încă în 1680, închisoarea în secolul al XVIII-lea iar "fântâna,, a fost distrusă în perioada 1680-1715. În același timp însă se constată o serie de modificări arhitectonice importante la cortine și la clădirile interioare, datorate folosirii cetății până în secolul al XVIII-lea. Cetatea, în stadiul său actual, este compusă dintr-o cortină de piatră de plan alungit, marcată la sud de donjon, la nord de un turn detașat de cortină înglobat mai târziu unui turn semicircular, mai târziu au fost adăugate alte turnuri semicirculare la est și la vest, utile armelor de foc. Stilul de elevație este opus incertum (fig. 39), cu asiză de egalizare la 1m. și mortar cu fragmente de cărămidă.



*Fig.6. Planul cetății, publicat de Gero László în 1955 Fig.7,8. Imagini Cetatea Bologa (sursa: colecție personală)*

### **Importanța rețelei de transport medieval și a punctelor vamale ale cetăților Bologa și Gilău**

Oportunitatea de a tranzita și tranzacționa resursele minerale din Carpați, bogăția resurselor alimentare din regiune, au asigurat un profil dinamic, întreprinzător pentru zonele aflate la poalele Munților Apuseni. Așa se explică densitatea în regiune a fortificațiilor preistorice, antice și medievale (eneolitic, bronz mijlociu, bronz târziu și fier timpuriu, perioadă dacică clasică, medievală timpurie), de prezența în regiune a celor mai mari așezări fortificate de pe continent, descoperirea celor mai mari și numeroase tezaururi de aur preistorice funcționarea unor ateliere meșteșugărești cu o producție continentală (Bologa-Resculum, Gilău). Legătura regiunii cu teritoriile învecinate, a fost deservită de patru drumuri integrate unei rețele transregionale. Iar ruta Cluj–Huedin–Bologa reprezintă sectorul transilvan care lega Clujul de Oradea și Solnoc, prin valea Someșului Mic spre Gilău și valea Căpușului. Se îndreaptă spre Dumbrava prin cumpenele de apă dintre bazinele Căpuș și Crișul Repede, se continuă prin zona înaltă a Podișul Păniceni până în localitatea Izvorul Crișului, după care ajungea la Șaula, Huedin, Bologa

(Țiplic, 2002, p. 107). Drumurile au integrat teritoriile nord-transilvănene cu structurile regionale extinse ale regatului prin culoare de acces, fiind constituit un sistem de axe provinciale interne care a făcut posibilă închegarea individualității teritoriale. Astfel căile de comunicație ale bazinului Someșului Mic erau jalonate de puncte de pază și de prezența vămilor în zonele de trecere (peste ape în special) indicând etapele călătoriei. Aceste aspect au determinat stabilizarea rețelei rutiere din jurul Clujului, amplasarea favorabilă a vămilor, corespunzând și intereselor proprietarilor de moșii și ale comunității traversate prin eficiența transporturilor, ducând la implicarea lor în scop economic. Drumurile medievale prezintă o serie de variante ce convergeau spre anumite puncte comune (Țiplic, 2002, p.110 ). Localizarea vămilor indică direcțiile traficului desfășurat în nordul Transilvaniei, fiind amplasate în apropierea cetăților (Almaș, Bologa etc.), la trecerile de peste râuri (Apahida, Bonțida, Gherla, Turda), la intersecțiile de drumuri sau în direcția centrelor economice importante (Apahida, Baci, Bonțida, Sănnicoară, Românași etc.) la puncte de graniță ale voievodatului (Almaș, Bologa, Meseș, Zalău) sau ale regatului (Bistrița, Rodna). Drumurile mari (*magnae*) dețineau o importanță sporită, fiind menționate în Evul Mediu și apar ilustrate pe vechi reprezentări cartografice ale Transilvaniei. Este vorba despre harta realizată de către *Morando Visconti*, a cărei publicare datează din anul 1699 (Țiplic, 2005, p. 45). Fiind reprezentative: cel care lega Clujul de Huedin, orientat spre vest prin Poarta Meseșului cu variantele prin Baci și Popești. Ruta Mera-Aghireș-Almaș-Cuzăplac constituia în perioada medievală artera transversală de comunicație spre vest pe drumul Oradiei, drumul Cluj-Baci-Românași, prin localitățile Cluj-Baci-Suceagu-Mera-Viștea-Turea-Gârbău- Băgara- Aghireșu, pentru a atinge drumul de pe Valea Almașului (Rusu, 1987, pp. 406-412) și condiționările geografice au determinat existența unui culoar de comunicație în Evului Mediu, pe traseul unor așezări și domenii (nobiliare și ecleziastice) importante, care au favorizat și implantarea în teritoriu a unor puncte fortificate pentru supravegherea culoarului și a drumului. Punctele vamale aveau o importanță în timpurile medievale, erau fixate în dreptul localităților Cluj-Mănăstur, Gilău, Dumbrava, Izvorul Crișului, Huedin, Bologa, iar datorită importanței comerciale a drumului, așezările de la Gilău, Dumbrava, Șaula și Huedin au devenit locuri de desfășurare a târgurilor (Toda, 2015, p. 3). Punctul fortificat situat la Bologa supraveghea trecerea pe cursul superior al Crișului Repede, având rolul de a evidenția poziția rutei în vârful ierarhiei drumurilor transilvănene, iar o sursă arhivistică din anul 1391 se referă la „două drumuri publice care duc de la Huedin la Cluj” situația prezentându-se identic și peste o jumătate de secol. O ultimă referire generală la calea de comunicație vestică pe malul Someșului Mic provine din anul 1501 (Rusu, 1987, p.118).

### **Consolidarea Ținutului Huedinului de la voievodate la district și județ**

Populația daco-romană a continuat să trăiască pe aceste meleaguri și în perioada plecării romane, iar dovezile în acest sens sunt cele două castre Bologa-Resculum și Gilău. Ulterior atacurile populației migratoare nu au lăsat dovezi consistente, la Huedin fiind găsit un cercel și un ac din aur din per.sec.IV-VI (Rep.Arh,p.233 -234). Ale informații documentare despre zonă le avem de la *Anonymus* în lucrarea *Gesta Hungarorum*.Menționa că la sfârșitul sec. al IX-lea maghiarii s-au așezat în Câmpia Pannoniei, iar în sec. al X-lea au început acțiuni de cucerire vizând și Transilvania. Ulterior s-au confruntat cu oastea condusă de „voievodul român Gelu” (*Gelou quidam blachus*) al cărui voievodat se întindea de la Mureș, culmile Apusenilor, până pe Meseș (Matiș, 2014, p.51). Iar teritoriul Huedinului făcea parte din acest voievodat.Din informațiile lui Anonymus rezultă că aceste voievodate au avut o independență față de Imperiul Bizantin, acceptând forțat suzeranitatea maghiară Secolul al X-lea este marcat de cucerirea Transilvaniei de către maghiari, desfășurată în mai multe etape (din anul 900 până în 1200). Acțiunea regalității maghiare de cucerire a Transilvaniei și introducerea formelor de organizare politico-instituționale; *principatul*, *cnezatul* au intrat în conflict cu vechile organizări



românești: cnezatele, districtele, voievodatele și țările. O formă de organizare care se impune din anul 1176 este *Voievodatul Transilvaniei*-documentele menționându-l pe „voievodul *Leustachius*„, vasal al regelui Ungariei. Între sec XI-XII izvoarele scrise sunt puține, voievozii din Huedin sunt atestați începând cu sec al XIII-lea la Călata (Sima, 1998, p. 69) continuând în secolul al XIV-lea cu cei de la Hodiș (1326) Nădășel (în 1370 Ladislau/Vasile „voievodul românilor” (*Wayvoda Olachorum*) apoi la Nadăș și Aluniș (1439 voievodul român Bârlea–Olahvajda) Huedin, Morlaca, Bica, Oarța/Varța (sat situat între Călățele, Călata și Văleni-azi dispărut) (Pascu, 1986, p. 457). Transilvania era organizată pe *comitatele regale*, conduse de un comite, stăpânind unul sau mai multe domenii în care staționau garnizoane militare. Primul comitat organizat a fost cel al Bihorului, atestat din anul 1111, urmat de comitatele Dăbâca, Crasna, Cluj, Alba, Sătmăr și Arad 1414 ([http:// istoria. md/ articol/70/Transilvania voievodat și principat](http://istoria.md/articol/70/Transilvania%20voievodat%20și%20principat)). În cazul voievodatului de Călata, în secolul al XIII-lea este atestat voievodul Nicola, urmat de „Ilie voievod de Călata” la 1467, amintit apoi în 1468-1469 ca „voievod al românilor” iar în 1474 apare Mihai ca voievod român de Călata (*Wayvoda Wolahalis de Kalotha*) și apoi ca voievod român al districtului Călatei (Csanki, 1913, pp.382-383). Al doilea voievodat mai important își avea reședința la Mărgău, iar între anii 1359 și 1511 sunt atestați diverși voievozi, în anul 1359 este menționat un voievod pe nume Dan (caracterizat ca nobil), pentru ca în anul 1405 să fie pomenit voievodul român (*Vayvoda Valachus*) Vasile/ Ladislau.

**Tabelul 1. Organizarea administrativ-militară în anul 1850-districte, circumscripții și cercuri**

Districutul	Circumscripția	Cercul	Satele componente
<b>Districutul Militar Cluj</b>	Dej <b>Cojocna (Cluj)</b>  Șimleul Silvaniei.	Huedinul- <b>centru de cerc</b>	<b>Jud.Cluj-30 de localități:</b> Huedin, Călata, Finciu, Călățele, Giurcuța de Sus, Bociu, Buteni, Ciuleni, Mărgău, Răchițele, Tranișu, Rogojel, Săcuieu, Vișagu, Alunișu, Brăișoru, Zam, Sâncraiu, Domoșu, Horlacea, Văleni, Nearșova, Bica, Mănăstireni, Mănăsturu Românesc, Bedeciu, Dretea, Ardeova, Izvoru Crișului și Șaula.

*Sursa; Recensământul din 1850, Transilvania 1996-Rotariu, T., Semeniuc, Maria, Mezei, E.*

În 12 mai 1851 pe baza rescriptului imperial, Transilvania este împărțită în *cinci ținuturi* (Sibiu, Alba Iulia, Cluj-din care face parte și Ținutul Huedin) divizate în *căpitănate*. Anul 1852 se revine la *districte* (Sibiu, Alba Iulia, Cluj, Bistrița, Odorhei) *cu cercuri și subcercuri* (Chita, 2018, p.45). În anul 1857 districtele militare și două regimente românești de graniță au fost înlocuite cu *nouă „municipii”*: Cluj, Dej, Alba Iulia, Deva, Sibiu Făgăraș, Odorheiu Secuiesc, Reghin și Năsăud, „*Municipiul*” Cluj era format din *șase cercuri*: Huedin, Hida, Mociu, Turda și Cluj ca oraș regal liber. *Cercul Huedin* era format din *56 de localități*, (Rotariu, 1996b, p. 204).

**Tabelul 2. Organizarea administrativ-teritorială în municipii din 1857**

Municipii	cercuri	Sate componente
Cluj, Dej, Alba Iulia, Deva, Sibiu, Făgăraș, Odorheiu Secuiesc, Reghin, Năsăud	Huedin, Hida, Cluj (cuprindea comunele din jur), Mociu, Turda și Cluj ca oraș regal liber.	Jud.Cluj-56 de localități-Huedin, Bedeciu, Bociu, Buteni, Domoșu, Horlacea, Ciuleni, Sâncraiu, Călata, Finciu, Călățele, Mărgău, Răchițele, Giurcuța de Sus, Rogojel, Săcuieu, Tranișu, Vișagu, Zam, Băbiu, Vânători, Ciucea, Poieni, Hodișu, Valea Drăganului, Bologa, Tetișu, Bicălatu, Izvoru Crișului, Văleni, Nearșova, Bica, Mănăstireni, Mănăsturu Românesc, Dretea, Ardeova, Șaula, Alunișu, Brăișoru, Morlaca, Leghia, Dângău Mare, Agârbiciu, Dumbrava, Căpușu Mare, Căpușu Mic, Păniceni, Nadășu

		Jud.Sălaj - Băbiu Fildu de Jos, Fildu de Mijloc, Fildu de Sus, Cutiș, Mesteacănu, Sfăraș, Jebucu și Stana.
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Sursa: Recensământul din 1857, Transilvania 1996-Rotariu,T., Semeniuc,Maria, Mezei,E.

Astfel, în anul 1876, pentru a șterge urmele vechii administrații austriece, au fost desființate vechile comitate, scaune și districte medievale, fiind înlocuite cu 15 comitate, împărțite la rândul lor în plăși sau cercuri, compuse fiecare din mai multe comune. Unul dintre comitate era Cluj (Kolozs) și în el era inclus și Huedinul, organizat ca plasă alături de plășile Gilău, Urmeniș, Mociu, Cluj, Almașu, Teaca și Cluj (zona din jurul localității), Plasa Huedin era formată din 46 de localități, fiind mai puține cu 10 localități față de anul 1857. În anul 1910, Comitatul Cluj cuprindea 9 plase, iar plasa Huedin era cea mai întinsă, cuprinzând târgul Huedin și 45 de sate. În 1918, datorită Tratatului de la Trianon din 1920, comitatul alături de Transilvania istorică a devenit parte a României. Iar după Primul Război Mondial, Comitatul Cluj a fost redenumit județul Cojocna, în 1925 a devenit județul Cluj cuprindea 237 de comune, grupate în 10 plăși: Borșa, Cluj, Cojocna, Gilău, Hida, Huedin, Mociu, Ormeniș, Sărmaș, Teaca și un oraș ca municipiu.

Raionul Huedin.

Regiunea Cluj a fost o diviziune administrativ-teritorială în partea central-estică a Republicii Populare Române din 1950 când au fost desființate județele (prin Legea nr.5/sept 1950). Prin aceste schimbări, țara a fost împărțită în regiuni, iar regiunile în raioane, Huedinul a devenit centru de raion, inclus în Regiunea Cluj, alături de raioanele Aiud, Beclean, Bistrița, Câmpeni, Cluj, Dej, Gherla, Jibou, Luduș, Nășăud, Sărmaș, Turda și Zalău. Teritoriul raionului Huedin cuprindea fosta plasă Huedin, plasa Călata, precum și părți din fostele plăși Aghireș și Hida. A existat până în 1968, când regiunile au fost desființate și cuprindea la înființare 8 raioane precum: Cluj, Dej, Gherla, Huedin, Jibou și Turda. În timpul acestei organizări administrative Huedinul a redevenit oraș începând cu 1 ianuarie 1961, statut pe care și l-a păstrat până azi.

## Concluzii

Regiunea Ținutului Huedin constituie o vatră de istorie milenară care oferă un potențial turistic încă nevalorificat suficient. Vestigiile istorice, culturale dar și ale cadrului natural se îmbină armonios cu aspectele etnografice unice, constituind un punct cardinal pentru un turist avizat.

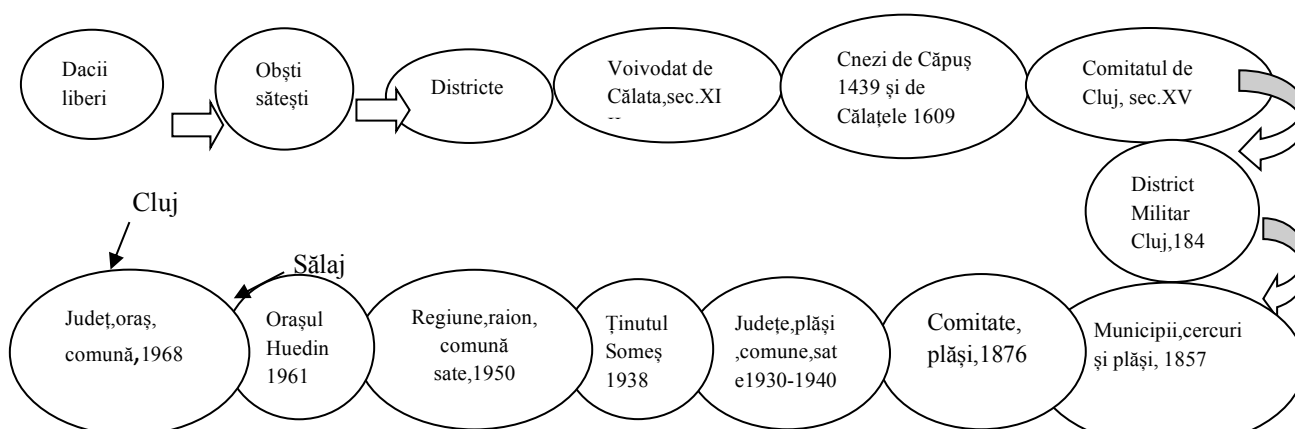


Fig. 7. Evoluția organizării administrativ-teritoriale a sistemului de așezări din Ținutul Huedinului

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# CIMITIRUL ÎNTRE ISTORICITATE ȘI MEMORIE. CUM “CITIM” UN CIMITIR? STUDIU DE CAZ PE MARGINEA MENTALITĂȚILOR: “CIMITIRUL DE SUS” DIN NĂDLAC, JUDEȚUL ARAD

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**Abstract:** *What type of data does the cemetery offer to a researcher: about religion/denomination, about ethnicity, about “community” relations, about local and/or family mentalities or other elements? The intention of the study is to visually and textually analyze the tombstones from the “de Sus” Cemetery (currently, the “Sfântul Ilie” Cemetery in Nădlac [particularization] in order to identify several attributes related to this cultural landscape [generalization]. Space of commemoration, mark of family status, space of commemorative or tourist visit, the cemetery ends up adopting even attributes that do not seem at first sight its own: playground, space for lovers, promenade, transit space between two areas, commercial space, even learning space for students, etc. In other words, it becomes what Foucault calls “space differently” (i.e. lived, experienced, thought or reconstructed differently/differently), adopting a compensatory function, as opposed to uniformity and regularization. Considered a project and a concept specific to modernity, this prerogative of the common cemetery comes precisely from the fact that a space par excellence sacred and controlled from an ecclesiastical point of view is secularized, as a space ex-ported to the periphery. If in the 19th and 20th centuries (until 1989), the cemetery benefited from a stereotype that encompasses tradition, I now believe that it sins through a “pseudo-legitimation”. The limited number of funeral offerings and the need for excessive individualization of the “memorial” often reaches the sphere of kitsch (a societal brand to be pursued, however, in the research project) - the tomb tends to become an elitist element (confirmed by the memory community and the biography of the deceased, functioning as a “place of everyone’s memory”, of intermemory) a “pseudo-elitist” monument. Despite these trends, I believe that the cemetery remains a SEMIOSPHERE, a concept by which Lotman defines a unifying semiotic space, necessary for the existence and functioning of divergent languages. The stereotype or too obvious originality, the grandeur or the sacrifice of the funeral traditions in the name of some fashions do not annul the capacity of the cemetery to function according to its primordial attributes: the identification function, the evocative function, the durability function.*

**Keywords:** cemetery, mentality, stereotype/kitsch, compensatory fonction, cultural landscape

## **Considerații teoretice asupra cimitirului ca formă particulară de peisaj cultural**

Dacă orice spațiu geografic transmite identitate, memorie, reprezentări și semnificații culturale, nu este deloc întâmplător interesul provocat în secolul al XX-lea de ceea ce s-a numit „geografie istorică” (centrată pe om și pe comunitate), „geografie a mediului înconjurător” (axată pe faptele de viață) și „geografie culturală” (asumând peisajul, locul, spațiul în semnificațiile și reprezentările lor identitare și simbolice). Particularizând, o lectură esențialmente culturală poate fi proiectată și asupra peisajului funerar, studiul de față plecând

de la raportarea la cimitir în sens general, predominant teoretică (și preluând sugestii terminologice și ideatice din lucrările prof. Doru Radosav), și particularizând considerațiile teoretice pe „Cimitirul de Sus („Sfântul Ilie” actualmente)” din localitatea Nădlac, județul Arad.

Pe direcția afirmației lui Carl Ortwin Sauer din lucrarea “The Morphology of Landscape” - în peisajul cultural coexistă cultura ca agent și natura ca mediu” [“The cultural landscape is fashioned from a natural landscape by a culture group. Culture is the agent, the natural area is the medium, the cultural landscape the result” (1925, p.46), peisajul cultural al cimitirului este și el rezultatul firesc de manifestare a acestei ambivalențe. Lectura culturală a peisajului tombal presupune detectarea dimensiunii vernaculare a cadrului geografic în care această lume se situează - „figura peisageră” a lumii sepulcrale poartă o marcă stilistică, originală în spațiul geografic în care s-a născut și s-a dezvoltat. Este suficientă o vizită în cimitirul Bellu (o proiecție a îndelung pomenitului spirit balcanic, pitoresc și scăpând oricărei intenții disciplinare) și o vizită într-un cimitir rural din proximitatea unei bisericuțe transilvane de lemn pentru a remarca un peisaj vernacular și identitar definibil atât ca vizibilitate (lectură-privire, lectură geografică), cât și ca lizibilitate (lectură culturală).

Patternul relației om/natură/habitat relevă vernacularul ca expresie culturală a unei arhitecturi specifice cu utilizări specifice. Raportul arhitectură/habitat/peisaj are drept numitor comun peisajul - habitat și spațiu natural/fizico-geografic, ce poate fi analizat din mai multe perspective: istoria artelor (canoane estetice), istorie literară (canoane literare, metafora fizico-geografică), geografie culturală (peisajul asociat limbajului, vizualului sau reprezentărilor simbolice - antropologie culturală).

În principiu, peisajul vernacular presupune reconstrucția lui în zona unei realități autoreferențiale (Radosav, 2012). Se definește prin elemente fizico-geografice, dar impune și o asumare subiectivă, respectiv interpretarea lui. Peisajul vernacular al cimitirului se definește drept unul ce prezintă note specifice, reieșite dintr-un accent cultural dominant al acestei spațialități, și anume moartea. Dacă peisajul este o fixare „din privire” a unui cadru fizico-geografic, a unei delimitări sau localizări în spațiul unei comunități sau al unei societăți, în cazul identităților spațiale, peisajul „morților” ca permanență, ca locuire sau ca amplasare fizico-geografică se raportează dual la peisajul și la habitatul „viilor”, care pun față în față imuabilitatea cu schimbarea. Însă abordarea peisajului funerar nu a beneficiat încă, într-un cadru mai general, de conceptualizări și de demersuri metodologice semnificative.

Cimitirul este un peisaj subiectiv „sine qua non”: un peisaj-subiectiv închis, personalizat, și un peisaj-subiectiv deschis, social. Această perspectivă este accentuată de dimensionarea temporală a peisajului tombal, a schimbării lui reale și perceptive. Grila dinamicii istorice a peisajului (conform J. Brinkerhoff Jackson) cu existența succesivă a trei etape culturale raportat la peisaj poate fi aplicată și în cazul cimitirului:

- Un peisaj cu tentă medievală, nepolitizat, concentrând elemente personale, organice, fără modificări semnificative în relaționarea om-peisaj;
- Un peisaj renescentist, prelungindu-se până în secolul al XVIII-lea, ca loc cu semnificații sacrale; inclusiv spațiul mortuar devine manifestare a proprietății, a permanenței și a puterii. Pentru a întări marca politică, în spațiul italian - de pildă - Michelangelo este angajat să creeze statui destinate exclusiv expunerii în mausoleu;
- Un peisaj contemporan, localizat, etnicizat, marcat de apartenența la o comunitate

(socială, etnică sau confesională); mă gândesc la diferențierile dintre un cimitir rural din satul tradițional, plasat circular în jurul bisericii, la peisajul satelor oltenești cu aglomerarea însemnelor funerare (stâlpi funerari, coloane ale cerului, cruci de pomenire, cruci de apă, cruci de jurământ, troițe, răstigniri) nu doar în cimitir, ci și la răspântii și la fântâni; la imaginea crucifixelor de metal cu Răstignirea care străjuiesc mormintele greco-catolice de la Ștei sau la arhicunoscutul „Cimitir vesel” de la Săpânța etc.

Orice peisaj vernacular se circumscrie și raportului permanență/transformare sau permanență/provizorat. Astfel, uneori, peisajul fizico-geografic este particularizat în raport cu anumite evenimente sau fenomene (peisaj temporar): din cauza unor circumstanțe sociale (sistemizarea urbană a impus și desființarea unor cimitire, cum s-a întâmplat în Arad - zona UTA de azi - sau în Budapesta - zona Tabán), din cauza războaielor, a epidemiilor, a calamităților (peisaj eroziv - în urma epidemiei de holeră din 1831, victimele au fost îngropate în Arad pe o insulă a Mureșului). Se poate manifesta și o plusvaloare a peisajului prin ritualuri și prin epifanii („Luminația”, apariția unor moaște etc.) Cimitirul poate fi analizat și conform dubletelor: peisaj cultural/scenografic (artificial), peisaj fotografic/cinematic, peisaj material, reificat/umanizat, peisaj natural/peisaj planificat sau reactiv.

Dacă „locul” poate fi considerat așezare, locuire, apartenență, legitimare originară, peisajul este și el un „datum”, marcat de dinamică; de aceea, ambele concepte, peisajul și locul, ca memorie și ca narațiune, se individualizează și în cazul cimitirului din punct de vedere istoric, cultural și identitar. Peisajul funerar este supus unei existențe/situări ce presupune o dinamică a locului, spațială, dar și temporală (mai ales ciclicitate, așa cum afirmă și Ecleziasul „din țărână este omul și în țărână se întoarce”).

Pe un alt palier interpretativ, cimitirul (ca peisaj) a evoluat spre o marginalitate corespondentă lumii moderne: direcționat dinspre centru spre periferie, dinspre centralitatea rurală spre marginalizarea administrativ-urbană, într-un cadru civilizator al lumii occidentale administrative și medicale. Astfel, cimitirul se înscrie întotdeauna într-un spațiu distanțat, în sensul că se află amplasat - cel puțin teoretic - la o anumită distanță de locuitori (impunându-se și legislativ o distanță de minim 50 de metri) sau simbolic (înconjurat de ziduri tot mai înalte și mai opace). Se amplasează într-un „spațiu nou socializat”, exterior, un spațiu antitetic în care - doar cu ocazia înmormântărilor, a pomenirilor și a sărbătorilor dedicate pomenirii morților - periferia devine centru și centrul devin periferie. Spațiul în care se așază, ca spațiu nou creat, trebuie disciplinat, ordonat, simetrizat. Periferia devine centru peisager al lumii, căci părăsirea centrului din timpul vieții de către decedat îl transformă în periferie (interschimbare specifică peisajului transpozitiv).

O altă caracteristică actuală a spațiului și a peisajului asumat de cimitir este cea a închiderii, a fundăturii. Astfel, acest spațiu a devenit, de cele mai multe ori, împrejmuit cu garduri (ghimpate), izolat, închis accesului liber – deseori și justificat din cauza profanărilor sau a furturilor de elemente funerare (cele cu rol estetic, dar și materialele care pot fi comercializate, precum bronzul sau fierul). Totodată, este și un spațiu tensionat de politicile publice, legislative și sanitare, de hotărârile urbanismului și ale autorităților locale laice sau religioase, mai exact tensionat de jonglarea permisivitate/interdicție: există numeroase relatări din mass-media privind „relocarea” unui loc de veci prin plata unei taxe sau exproprieri incluzând și acest spațiu considerat altădată tabu.

O altă particularitate a peisajului de tip cimitir este paradoxul dintre imaginea morții reflectate evident și faptul că un cimitir nu este o „geografie a absenței” și a abandonului, un spațiu fără ancoraje, cu o toponimie inexistentă, o etnografie fără o memorie colectivă. Dimpotrivă. Peisajul lumii sepulcrale este un cadru fizico-geografic suprasaturat de memorie, fixat în timp și în istorie, definit de inscripționări identitare - elemente care vor fi particularizate în cazuistica propusă. Ceea ce conduce la o ultimă caracteristică a peisajului funerar: glisarea de la anacronismul cimitirului la un cadru fizico-geografic și cu variabile culturale modelate de timp, de istorie, de etnie, de confesiuni și de comunități, chiar și de relațiile de rudenie.

Dimensiunea istorică a raportului dintre om-peisaj-timp necesită conexiunea etnologică și antropologică a analizei cimitirului. Aceste abordări pot lua în considerare și două repere esențiale pentru binomul peisaj-habitat, și anume, cimitirul individual/familial și cimitirul colectiv: ÎNGROPAREA ÎN CIMITIR SAU ÎN GRĂDINĂ (inclusiv, Dumitru Fărcaș, acum câțiva ani a fost îngropat în gospodăria străbună). Noțiunea de „mormânt în grădină” ca loc în natură, în peisaj sau ca peisaj asumat de comunitatea rurală se poate analiza din perspectivă etnografică: semnifică un loc al universului ocupațional, căci în satul de munte și de deal, răsfirat și risipit, se practica înhumarea în spațiul domestic („Să mă îngropați/În dosul stânii/Să-mi aud câinii.”), cu rezonanțe posibile din cultul roman antic al larilor și al penaiilor (ca spirite ale strămoșilor devenite forțe apotropaice ale casei). În civilizația și în habitatul rural din lumea țărănească românească, coexistă - încă - două tipuri de „locuințe ale morților”: cele din perimetrul casei strămoșești și cele din cimitirul satului. Începând cu sfârșitul secolului al XVIII-lea, reformele iosefine produc o dinamică, o schimbare inclusiv în această dispunere/raportare a viilor față de morți: o rotație (schimbare) ce amplasează cimitirul într-un orizont închis, circumscris sau fixat liminar în raport cu locuințele oamenilor.

Cimitirul circumscrie o identitate culturală amplă, construită pe dialectica viu/mort, acasă/groapă, teritoriu/nonteritoriu, loc bun/loc „impur”, apartenență/vecinătate, cultură/natură. Locul, spațiul, peisajul intră în contradicție cu un nonteritoriu specific lumii sepulcrale. Pornind de la ideea că identitatea s-a format prin definirea unui spațiu, înseamnă că identitatea transferă sau transportă o identitate a spațiului, o subiectivitate spațială și o marginalitate a cimitirului. Particularitățile peisajului funerar țin, așadar, de marginalizări, de închideri și de restricții, determinând un peisaj de tip „limes”, nonteritorial, impus, dar și autoimpus de fenomenul ocultării morții în societatea contemporană: serviciile de pompe funebre preiau aproape tot ce ține de înmormântare, reducând la minim contactul cu decedatul. În condițiile în care cimitirul are și o capelă, sicriul este deja marginalizat, păstrat la distanță de viii care trăiesc spaima întâlnirii cu moartea într-un spațiu septic.

Cimitirul era reglementat, uneori, prin hotărâri ale autorităților bisericești sau, mai târziu, laice; uneori, conform unui regulament de funcționare a cimitirului evanghelic (din Năsăud, din Sibiu cf. Rotar, 2006: anexe passim.; Gangolea, 2014: anexe passim.; Șerdean, 2015: anexe passim.), în schimbul unei taxe pe care familia trebuie să o plătească parohului, se pot înmormânta în perimetrul alocat confesiunii și cei ce nu aparțin de aceeași confesiune (dar taxa era mai mare decât la enoriași). Se reglementează, așadar, habitatul unei comunități rurale prin interdicția înmormântărilor intramuros. Se construiește, din perspectiva raporturilor dintre oameni și autoritatea statului, un loc cu valențe sociale, și economice/politice, ce structurează relațiile de putere cu autoritatea de stat: se încearcă o strategie de coexistență între paradigma ancestrală, a îngropării cât mai aproape de centrul sacru religios sau personal (vatra casei), și



viziunea modernistă, de organizare administrativă a practicilor asociate decesului cât mai departe de „privirea” viilor. Nu scapă nici de catagrafierea cu scopuri de secularizare, de evidență și de fiscalitate a lumii rurale, practică prin care se produce și o „fixare în peisaj”. Ordonarea înhumării, acceptarea plasării la periferie, taxele fixate clar modifică identitatea comunităților începând din secolul al XX-lea în special. Periferia devine, în cazul cimitirului, o caracteristică a peisajului contemporan, doar varianta cimitirului în jurul bisericilor de lemn din Maramureș și Sălaj și/sau a îngropării în spațiul domestic rămânând o marcă etnică.

Peisajul și habitatul tradițional al cimitirului dinainte de impunerea restructurărilor iosefine poartă caracteristicile unei fizionomii ce evidențiază firescul coabitării dintre generații, dintre strămoșii de sub glie și urmașii care trebăluiesc prin gospodărie: Ana Blandiana în discursul liric din „Părinții” amintește tocmai de această smerenie a părinților care se pun sub glie pentru a fi temelie fiilor. În schimb, scandalul de la Valea Uzului (cimitirul militar) reclamă mutarea forțată a mormintelor într-un alt loc, profanarea acestora, mistificarea adevărului istoric vizavi de victimele îngropate în acel cimitir. Crucile sunt afectate în habitatul lor tradițional, și anume, sunt schimbate, modificate, metamorfozate în simboluri identitare naționaliste (de către o tabără sau de către cealaltă). Această amplasare neprielnică, contrapusă situării tradiționale a peisajului funerar relevă o geografie umană marginală, dar conectată la etnicitatea conflictuală a zonei. Peisajul și habitatul sunt, astfel, particularizate de interese politice: administrațiile din cele două județe își revendică dreptul la intervenție într-un anumit loc, conform reglementărilor legislative oficiale. Suprapunerea ritualului sărbătoresc (Ziua Eroilor) acestui spațiu contestat desacralizează raportarea la interdicțiile de a profana un cimitir: violențe, îmbrânceli, acuze și injurii constituie impietăți care - bineînțeles - sunt justificate din perspectiva unui act justițiar legitimator: a restabili un adevăr al cimitirului de altădată. Această „politizare” a cimitirului este accentuată de mass-media și de declarațiile incendiare.

Procesul de emancipare a cimitirului presupune și o nouă calitate a materialului pentru piatra funerară, și anume trecerea de la cruci de lemn la cruci de piatră/beton/marmură/granit. Primele sunt expresia lumii de altădată, tradițională, simplistă și simplificată/esențializată (care prefera crucea de lemn nu numai datorită factorului financiar, ci și pentru că se spunea că fiecare mort își duce pe lumea cealaltă crucea de pe mormânt, mai grea sau mai ușoară). Pe când monumentele funerare de azi sunt relevante din punct de vedere al libertății dobândite și nu doar al unui nou standard de viață. Cele două imagini sepulcrale se contrapun într-un habitat ce presupune condiția de proprietari, marcată imemorial de moștenirea din generație în generație. Aceste „morminte părintești” presupun un patrimoniu ereditat. Gropile părinților exprimă succesivitatea înhumărilor în același loc, iar „proprietatea” este condiționată de succesiunea generațiilor (actualmente, în cimitirele private, se dă chiar și C.F. pentru a marca proprietatea individuală). Moștenirea și proprietatea definesc același tip de habitat ca fixare și, deopotrivă, ca încadrare și ca adjudecare a unui peisaj.

Descrierea lumii funerare, din perspectiva raportului peisaj-habitat, nu poate fi detectată generos în teritoriul transilvănean. Aplecarea spre problematica acestui spațiu vine mai degrabă dinspre școala etnologică/antropologică. Într-o epocă în care proiecția asupra lumii diversificate etnoculturală din spațiul transilvănean, era accentuată și de proiectul național din prelungirile romantismului, cercetarea cimitirelor s-a derulat fără mare atenție, oscilând între ideologie, curiozitate erudită, imagologie și monografii ale indivizilor din colectivitate.

Habitatul cimitirului din discursul epocii respective (secolele XVIII-XIX) este diferențiat între tipul rural și tipul urban, între cimitirul confesional și cel al „localității”, deschis tuturor.

În spațiul literar autohton, peisajul funerar a beneficiat de puține descrieri [poate sunt mai numeroase - în stadiul actual al cercetării, acestea sunt pentru mine relevante...] precum cele realizate de Mihai Eminescu („Melancolie”), de Ioan Slavici („Moara cu noroc”, „Popa Tanda”) sau de Miklos Banffy („Trilogia transilvană”). Astfel, într-o descriere din romanul lui Miklós Bánffy (Bánffy, 2019: *passim.*), în care habitatul este articulat de peisaj, se arată că, dacă habitatul este sub semnul precarității și al întâmplării, opțiunea peisageră vizează un cadru natural estetizat, ca o grădină care permite plimbarea celor doi îndrăgostiți. Dinamica habitatului este contrapusă unei regularități a opțiunilor peisajere și este reprezentată de un peisaj de lizieră și de proximitate cu teritoriul Clujului de secol XIX (viziunea romanțioasă a Cimitirului Central de azi).

Provocările imagologice din descrierea cimitirului poartă, de multe ori, o amprentă peiorativă, stigmatizantă. Din aceste descrieri se pot degaja și elemente de peisaj și de habitat aferente acestei lumi marginale. Astfel, viziunea eminesciană conturează o atmosferă pesimist-demonizată, cu cimitirul dominat de cruci de lemn strâmbate de trecerea vremurilor care înconjoară biserica parcă părăsită, cu chipuri palide țesute pe pereți, în timp ce sună clopotul sau toaca sau cucuveaua. Alteori, descrierea habitatului este impregnată de o sensibilitate compătimitoare, literaturizantă: convergența aproape organică dintre om, natură și peisaj sepulcral este evocatoare în „Moara cu noroc” (Slavici, 2018:3) - cele cinci cruci plasate în față la cârciumă sunt focusate de privirea auctorială (două de piatră, trei de lemn de stejar, împodobite cu țarcălam și vopsite cu icoane). Dacă bătrâna le asociază cu un loc binecuvântat, interogația retorică a lui Lică („Ungurul a murit?”) stârnește cititorului o altă bănuială. În schimb, nuvela „Popa Tanda” a aceluiași scriitor șirian plasează metamorfoza satului Sărăceni în finalul textului (capitolul III) sub privirea binecuvântată a unei „rugi” - loc de popas și de privire panoramică spre sat.

Această coexistență până la identitate a habitatului cu natura (peisajul) sugerează și o altă similitudine, cea dintre realitatea cimitirului și ficțiunea legendară. Construcțiile narrative romantice, întreținute de exotism și de aplecare spre mortuar au făcut o lungă carieră în literatura cultă. Spațiu al libertății și, deopotrivă, al constrângerii, al supunerii și al marginalizării, lumea cimitirului, în realitatea ei proprie, frustră, a alimentat ficțiunile lumii civilizate. Habitatul și peisajul a întreținut permanent acest transfer dinspre realitate înspre ficțiune: poveștile cu vârcolaci, cu spirite malefice sau doar venite din lumea thanaticului, cu superstițiile asociate mortuarului sunt binecunoscute - „Zburătorul” lui Ion Heliade-Rădulescu, „Jandarmul” lui Agârbiceanu, „Papucii lui Mahmud” (Gala Galaction), eliadesca „Domnișoară Christina” sau sadovenianul „Baltag” sunt doar câteva punctări firești...

Locurile funerare se află, paradoxal, într-o nesfârșită schimbare și transformare, căci - în societatea contemporană - vizează o lipsă a locului permanent, o delocalizare în favoarea unei concesiuni limitate legislativ/administrativ (mormântul este concesionat de o perioadă de „n” ani celui care plătește pentru el). Este o lume atinsă și ea de o permanentă mișcare, de nedefinire imuabilă a locului; situarea între natură și habitat este revelată de imaginea îmbinării sau a lipsei de graniță dintre morminte și vegetație, dintre habitat și peisaj, în condițiile în care locurile funerare se pierd treptat ca identificare și localitatea avansează către cimitir. Această particularitate transgresivă dintre natură/peisaj și habitat marchează definitiv o parte importantă

a identității cimitirului.

Plasarea cimitirului în cadre spațiale de viață precum habitatul și peisajul, cadre constituite și verificate istoric, poate fi analizată și dinspre direcția „privirii dinăuntru” care oferă detalii despre procesul (auto)definirii identitare și, în același timp, proiectează un contur cultural complex și plin de semnificații. Pornind de la aceste ipoteze, se deduce faptul că, alături de percepția sau de înregistrarea istorică, un rol important în analiza peisajului asociat cimitirului, ca loc cu semnificații culturale, îl are memoria. În trinomul loc-memorie-identitate, medierile culturale se bazează pe constatarea că experiența și practicile de apropiere a peisajului se relevă/se reconstruiesc prin dinamizarea narativă a memoriei. Această abordare permite trecerea de la istoria habitatului și a peisajului la istoricitate.

Apelând la fotografii și la câteva mărturii, colectate în urma unor interviuri de istorie orală privind Cimitirul De Sus din Nădlac - județul Arad, s-a putut degaja o stratigrafie de memorie a peisajului sepulcral, căci parcursul biografic și genealogic concentrează succesiunea tipurilor de peisaj aferent. Metamorfozele cimitirului reconfigurează profilul identitar, individual și colectiv. Povestea autobiografică, provocată de interviul de istorie orală, fixează o memorie a habitatului ce distribuie, în timp, tipuri și etape evolutive. Astfel, povestirea autobiografică relevă la început o memorie a crucii de lemn asociate bunicilor și străbunicilor. Aceste cruci individuale de lemn, a căror imagine este păstrată în memoria individuală, erau variante tipice pentru lumea rurală, pentru aproape toți membrii familiei - sub semnul sărăciei și al lipsurilor care sunt contrapuse situației prezente, prospere (a face alte cruci pentru bunici). O dezvoltare aparte, în narațiunile autobiografice, o deține al doilea strat memorialistic, și anume, memoria crucilor de piatră. Acest tip de memorie a declanșat o narațiune corelată cu amintirea celor care le confecționau și a faptului că nu le-a putut salva la timp de distrugere, astfel încât trebuie să le reface în totalitate („s-a rupt un braț orizontal”). Aceste două analize ale crucilor strămoșilor (părinți, bunici), descriere transmisă oral, definește peisajul sepulcral ca un cadru rezultat din intersectarea privirii cu spațiul, în urma unei distanțări în spațiu, dar, în cazul de față, și a unei distanțări în timp. Aceste două distanțări de cadrul fizico-geografic, intermediare de privire, dar mai ales, după opinia mea, distanțarea în timp, produc ceea ce este cunoscut ca peisaj, adică percepția „virtuală și idealistă” a cadrului natural. Prevalența responsabilității față de înaintași în construcția peisajului, în cazul de față, indexată în memorie și transmisă oral, narativ, se validează și în descrierea peisajului congruent acestuia. Această prevalență vizuală în definirea peisajului depășește un alt tip de percepții sau de contact cu peisajul, „plimbarea prin cimitir” pe la toate mormintele importante („îmi ia cam o oră să trec pe la toți” afirma M.T.). Așezarea crucilor se făcea în funcție de nevoile curente ale vieții și, din acest motiv, se poate înregistra și o memorie a peisajului: se înlocuia crucea de lemn cu cea de piatră cam la un an, fără a se arunca prima cruce și se sfințea de către preot. Astfel, peisajul aferent habitudinilor rurale presupune elementul religios, sacralizarea suplimentară a mormântului.



*Imagine 1: Cruce de lemn și de beton*



*Imagine 2: Cruce de lemn și de fier*



*Imagine 3: Cruce de beton și de lemn*

O ultimă secvență pe itinerarul memorial al peisajului sepulcral este memoria monumentului funerar. Trecerea de la crucea de lemn la crucea de beton și, actualmente, la adevărate imagini (mai apropiate de kitsch sau mai elegante) ale grandorii celor vii în memoria celor morți s-a făcut, așa cum se observă dintr-o simplă plimbare prin cimitir, încă din anii '90, aspect ce coincide cu o libertate/occidentalizare a ofertei funerare. Dacă secularizarea de secol XVIII a coincis și cu un proces major de schimbări culturale privind amplasarea și reorganizarea cimitirelor, în manifestarea ideologiei comuniste, direcționarea coercitivă spre omogenizarea socială, economică, politică a societății ar fi presupus, în mod firesc, și o aplatizare a spațiului funerar (însă nu s-a intervenit în acest habitat); în schimb, după anii 2000, administrația urbană mai ales a atentat la spațiul funerar, cartografiind mormintele care s-ar putea da în folosință altor persoane, dacă urmașii nu mai plătesc o taxă. A apărut, așadar, un fenomen straniu, al coabitării - dincolo de moarte - a unor identități întâmplător asociate; noii proprietari păstrează, deseori, însemnele identitare ale celui decedat anterior - apare o simbioză datorată probabil vechiului dicton „despre morți numai de bine”, concretizată într-o formă de „noli me tangere”.



*Imagine 4: Monument funerar recent (după 2015)*



*Imagine 5: Coabitare la locul de veci (Cimitirul Eternitatea, Arad)*

Această succesiune sau stratigrafie memorială (memoria crucii de lemn, memoria crucii de piatră - mai rar de fier, memoria monumentului funerar), ca tipuri sau secvențe plastice derulate istoric și fixate în descrierile amintirilor individuale, a culminat cu formularea unei noi conștiințe de a moderniza vizual acest peisaj. Conștiința actuală derulează un proces complex de recentrare identitară familială și individuală în care însemnele funerare devin o miză cu circumscrieri egocentric și cu accente occidentale. Dar apar și valorizările patrimoniale ale unor morminte sau ale unor secțiuni de cimitire: aceste pledoarii pentru încadrarea unor elemente de arhitectură/artă funerară pe lista monumentelor istorice de interes național sau local echivalează cu o nouă configurare identitară. Conștiința gregară a unei apartenențe la un habitat și la un peisaj a evoluat spre o conștiință articulată, în acord cu drepturile și cu libertățile aferente tuturor cetățenilor și cu legislația europeană. Este un parcurs cultural-istoric ce culminează cu momentul petiționar din ultimii ani pentru includerea în circuitul patrimonial a câtorva sute de morminte din Hajongard (Cluj-Napoca – există și o asociație care și-a asumat și acest scop), din cimitirul „Bellu” (București - înscris în asociația europeană a cimitirelor) sau a cimitirului „Eternitatea” (Iași).

### **Cimitirul de Sus (Sfântul Ilie) din Nădlac**

Câteva date despre localitatea cercetată sunt concludente: suprafața totală a Nădlacului este de 133,15 km<sup>2</sup>, din care suprafața arabilă este de 121,17 km<sup>2</sup>. Suprafața teritoriilor administrative este de 13.315 ha, din care: 12.116 ha - teren agricol; 1.199 ha - teren neagricol. Prin urmare, Nădlacul se definește prin 91 % suprafață agricolă, ceea ce determină specificul zonei. Plasată în Câmpia Nădlacului, parte a Câmpiei Aradului/a Luncii Mureșului, așezarea este modelată în special de râul Mureș. Atestată documentar din anul 1192, sub forma *Noglok*, dar și în cronicile sau în acte de donație, din perioada medievală, în anul 1457 este amintită deja ca târg (*oppidum*) cu *civites et hospites*. [informații preluate din monografia Nădlacului (Petre Țiucra Pribeagul, 1936:244).

În abordarea cimitirului ales (localitatea are două cimitire pentru comunitatea ortodoxă - sârbă, română - și greco-catolică, respectiv un cimitir pentru celelalte confesiuni), conform unei grile proprii, se înglobează cât mai multe surse editate și inedite, primare și secundare. Din cauza absenței unor lucrări „țintite” pe acest subiect, voi apela mai ales la surse inedite de documentare: documente de arhivă, însemnări pe cărți, epitafuri, inscripții și fotografii pe

suport ceramic, ornamentică (arta minoră), necrologuri, dar și istoria orală, încercând – prin cât mai multe interviuri („microistoria”) – să punctez următoarele elemente:

### **1. Datare și plasare (se urmăresc următoarele aspecte)**

*\*Când a fost înființat cimitirul?*

În absența posibilității de a consulta toată arhiva parohială, am luat în considerare ce au spus intervievații și ce arată datele de pe pietrele funerare cele mai vechi: sfârșit de secol XIX – început de secol XX (mai ales că există două cripte care nu puteau fi ridicate în timp foarte scurt – cea a fam. Morariu are cel mai vechi deces în 1929; cea mai veche inscripție descifrată este pentru Mărina Mărginean născută Luțiai, repausată în 1902)

*\*Unde a fost plasat? De ce s-a ales acel loc? A existat un amplasament mai vechi? Din ce cauze s-a modificat amplasarea? Există mărturii/documente despre vechiul cimitir? Ce se întâmpla cu cei morți la „sălaș”? Cum s-a raportat comunitatea la aceste modificări?*

În condițiile dezvoltării localității spre actualul centru (apar case mari cu porți boltite și cu ganguri acoperite, case de „găzdoi”), cimitirul a fost plasat înspre marginea localității, dar azi este între două străzi, înconjurat de case și înainte, și după el. Intervievată, M.T. a spus că s-au cumpărat din locurile de case ca să se extindă. Se pare că a apărut și acest cimitir, deoarece era mai aproape de centru și de cei din Viile Vechi, altfel ar fi trebuit să meargă până în celălalt capăt de sat cu dricul (aproximativ 7 km.). Din câte se știe, nu au fost oameni înmormântați la „sălaș” (adică în afara perimetrului localității). O ciudățenie este și denivelarea cimitirului, înspre centrul acestuia – unde este cripta familiei Pătean – ridicarea terenului este evidentă, va și cum ar fi o movilă. Se pune întrebarea dacă este un dâmb natural [puțin probabil, pentru că nu mai există astfel de denivelări în zonă] sau unul construit artificial. Întrebarea legitimă este de ce s-a optat pentru această formulă: o explicație posibilă este faptul că întreaga așezare este foarte joasă, iar când se sapă se ajunge repede la pânza freatică; ridicând terenul, sicriile nu stau în apă; o altă explicație ar putea fi existența unui „holumb”, un dâmb mai vechi unde au fost îngropați morți într-o groapă colectivă; se poate accepta ipoteza, deoarece și în cercetările din Ungaria, zona Gyula, se pomenește de această strategie, de a îngrămădi morții și de a pune pământ peste ei; totodată, T.P. povestește despre „Holumbu’ Izvorului”; când s-a construit calea ferată în 1956, nădlăcanii care au cărat pământ cu căruțele au găsit gamele și baionete].

*\*Care este cartierul/cartierele arondat(e) și bisericile/parohiile corespondente? Cimitirul preia denumirea zonei (cum se explică aceasta?)? Sau primește o denumire specifică?*

Foarte pragmatic, se îngroapă în acest cimitir toată populația de la biserica ortodoxă înspre șoseaua națională (străzile orientate spre Arad) și cei din Viile Vechi; cei de la biserica ortodoxă înspre granița cu Ungaria se îngroapă în Bujac. Probabil că, dacă mormintele strămoșești sunt într-un anumit cimitir, nu se mai ține cont neapărat de această delimitare – mătușa mea, Teresca Onea, care a stat exact lângă biserică a fost îngropată în Cimitirul de Sus, deși ar fi fost la limita dintre cele două cimitire – soțul ei care a fost episcop al bisericii și socrii sunt îngropați tot aici – deci, s-ar putea lansa ipoteza că acest cimitir devine rapid cel al „elitelor”. Preoții Nicolae Mărginean și George Șerban sunt și ei îngropați pe parcela centrală, chiar lateral, crucile lor foarte înalte străjuind tot cimitirul. După anul 2000 se începe construcția capelei în acest cimitir și cimitirul primește numele „Sfântul Ilie”.

## **2. Date statistice și demografice. „Harta” cimitirului**

Se menționează:

*\*suprafața arondată cimitirului; numărul de morminte existente/potențiale, sectoarele cu denumiri administrative sau folosite de comunitate; primul deces/ultimul deces (dacă este ceea ce se numește un cimitir „închis”); procentul din spațiul cimitirului alocat unei comunități în raport cu numărul declarat al membrilor din respectiva comunitate;*

În absența posibilității de a consulta arhivele Primăriei, se poate doar estima faptul că acest cimitir se întinde cam pe lungimea a două-trei gospodării în lungul străzii (o gospodărie având arondat cam un lot de aproape 500 m<sup>2</sup>). Tot estimativ, numărul de morminte ar fi de 2000 de morminte, din care ocupate sunt cam 1250, iar cel mai vechi decedat - 1902 (conform crucii păstrate – se pare că nu există o cartografiere a cimitirului; la biserică, cel care se ocupă de lumânări ținea un caiet în care însemna cine cât a dat pentru cimitir; ulterior, au început să se dea chitanțe pentru plata anuală, dar tot nu s-a realizat cartografierea sa).

Este în continuare unul dintre cimitirele care deservește comunitatea ortodoxă și cea greco-catolică. În ultimii ani, au apărut disensiuni, din cauza necesității de a se delimita clar cele două confesiuni - acțiune aproape imposibilă datorită mixajului etnic și confesional din localitate. Pentru comunitatea greco-catolică este alocată cam o șesime din perimetrul actual al cimitirului - cea din zona capelei mortuare.

*\*orientarea mormintelor/crucilor (în funcție de confesiune); în ce măsură se respectă în cimitir; orientarea scrisului de pe morminte/crucii*

Toate crucile respectă orientarea conform tipicului bisericesc - piatra funerară este așezată în partea de vest a gropii, la capul decedatului, picioarele decedatului sunt îndreptate spre răsărit (astfel încât, la Învierea de Apoi, morții să se ridice cu fața spre est). Există câteva morminte în lateral diagonală de capelă (printre care și mormântul lui Uroș Totorean, unul dintre delegații comunității românești din Nădlac la Alba Iulia) care nu respectă total orientarea - par a fi deviate spre nord-vest; ceea ce ar dovedi vechimea lor, amplasarea lor la distanță de celelalte morminte de pe parcela „elitelor” ar fi dus la o ușoară deviație.

Scrisul este orientat aproape întotdeauna spre est, cu excepția pietrelor funerare de la aleea principală - se pare că s-a instaurat obiceiul de a se scrie spre partea dinspre alee, spre a fi mai vizibile pentru trecător.

*\*materialele folosite în general pentru mormânt/cruce (secolul al XIX-lea până înainte de IRM, în perioada interbelică, în comunism, în perioada postdecembristă)*

Actualmente, sunt foarte puține cruci de lemn (în jur de 10) - chiar și pentru morții decedați recent se utilizează cruci de aluminiu pe care se scrie cu marker negru (deseori, se șterge foarte repede). Ulterior, crucile de lemn/de aluminiu se înlocuiesc cu cruci de granit/marmură (culoarea neagră tinde să se generalizeze). Totuși, deocamdată, sunt mai multe pietre tombale de beton.

*\*amplasamentul unor cripte/cavouri, capele, clopotnițe și date despre acestea*

Capela funerară, a cărei construcție s-a început după anii 2000, este amplasată aproape de intrarea din strada Mihai Eminescu - de la poartă în partea stângă; înainte, acolo era o construcție destinată uneltelor groparului, iar fântâna cu cumpănă din spatele clădirii a fost dezafectată și s-a înlocuit cu o cișmea („smârg”) racordată la rețeaua de apă potabilă a orașului. Pe parcela centrală a cimitirului există cripta familiei Pătean Traian; după conformație, pentru trei persoane - despre care intervievații nu știau aproape nimic (unii nici cui aparține - element

interesant, tocmai pentru că deține locul privilegiat în acest cimitir). Pe parcela din fața capelei (cu mormintele cele mai vechi) este cavoul familiei Morariu a lui Cucu - familie evocată de doi dintre intervievați (T.P. și M.T.). Primul a și fost, des, în copilărie în casa acestora: rememorează încăperile luxoase, dar și felul în care statutul de „găzdoi” (chiabur) a declanșat destinul tragic al acestei familii, care a fost deportată la Deva. Nicolae Cucu este implicat în comitetul de administrație a Institutului de Credit și de Economii „Nădlăcana”, înființat în 1895, care avea 100.000 coroane capital inițial, iar în 1918 – 250.000 de coroane. (Weil, Alois, Cășap, Gabriel, Chirescu, Ion, 2019:185, 241-242, 243).

#### *\*îngrădirea cimitirului*

Cimitirul are gard de sârmă pe toate laturile, iar cele două intrări – de pe strada George Enescu și de pe strada Mihai Eminescu – sunt marcate cu porți de fier vopsite grenă (culoare des întâlnită la „căputurile” nădlăcane). Aleea principală devine, astfel, și un culoar de trecere de pe o stradă pe alta (o scurtătură); porțile sunt mereu deschise – integrarea zonei cimiteriale în spațiul privat și public fiind firească.

### **3. Evocarea cimitirului în diferite texte**

*Se urmăresc următoarele aspecte: există în beletristica unor scriitori (nu neapărat originari din acea zonă) trimiteri spre cimitirul cercetat? Există povești, legende, superstiții, cântece prin care comunitatea se raportează direct la cimitirul său sau la cimitir în general? Există texte memorialistice (jurnale, memorii, texte epistolare, amintiri, însemnări de călătorie) care evocă exact cimitirul cercetat? Există texte jurnalistice (articole, postări pe bloguri, știri de senzație gen furturi) sau videoclipuri/filmări/fotografii din acest cimitir?*

Din cele cercetate până în prezent, este greu de spus dacă a evocat cineva cimitirul din Nădlac; dificultățile de a descoperi această pomenire se datorează mai multor elemente. Din câte știu, pe lângă autorii de literatură slovacă, singura autoare de origine nădlăcăncă este Lia Albu, care a și scris romanul „Senioria țărănească” (evocând voalat destinul familiei Caba), respectiv „Alexandru” (în care evocă destinul lui Alexandru Chicin, ajuns diplomat la Ambasada Franceză; la înmormântarea lui la Paris a venit inclusiv ambasadorul Gruziei, deoarece familia Chicin are rădăcini nobiliare gruzine). Poate în fondurile arhivistice familiale (fond Atanasie Marienescu, fond Șandor, fond Șerban) se regăsesc alte elemente relevante.

Un moment important, relatat în presa arădeană a vremii, a fost vizita regizorului Andrei Șerban la Nădlac (august 1994): venit la Arad pentru a susține un workshop teatral, acesta a vizitat la Nădlac și mormântul strămoșilor săi pe linie paternă (judecătorul Mihai Șerban și părinții săi, pr.Gheorghe Șerban și Pulcheria, fiica preotului Mihai Cervencovici).

Tot în presa postdecembristă s-ar putea să se regăsească și știrea despre furtul unei statui din acest cimitir, unul dintre elementele spectaculoase la nivel plastic: pe aleea centrală, pe partea central-dreaptă spre cripta familiei Pătean există placa mortuară fastuoasă de marmură neagră încadrată într-un chenar de marmură albă, aparținând fam.Petru Mărginean. Pe acest fundal se profilează în nărimă naturală o „Mater dolorosa” expresivă, chiar dacă drapajul mânecilor este mai rustic. Statuia a dispărut din cimitir, dar a fost recuperată în scurt timp.

O altă poveste a cimitirului este cea despre soldații ruși înmormântați aici în al Doilea Război Mondial și deshumați pentru a fi duși în altă parte (posibil la Cimitirul Eroilor din Arad, Cimitirul „Pomenirea”) [conform interviului cu T.P.]. Conform arhivelor consultate de istoricul arădean Horia Truță, la Nădlac ar fi rămas: 3 morminte comune și 46 individuale în



cimitirul sârbesc [probabil în Bujac]. Nu sunt împrejmuite, dar sunt întreținute (Truță, Horea, 2014: 261). Realitatea contrazice însă datele de arhivă, nu mai există niciun mormânt de acest tip (probabil au fost reînhumati la Arad în Cimitirul „Pomenirea”).

Mai recent, o oarecare disensiune a apărut din cauza mutării monumentului în memoria eroilor din Primul și din al Doilea Război Mondial - inițial, crucea comemorativă era plasată în centrul primei parcele pe un soclu de beton, acolo unde erau îngropate și cele trei victime din război căzute în zona Nădlacului. Actualmente, monumentul a fost adus chiar la intrarea în cimitir înaintea de capelă tot în stânga intrării, dar mormintele celor trei au rămas neamenajate (ceea ce spune unul dintre intervievați „nu se face”). Sunt amintiți eroii din Primul Război Mondial, căzuți în zonă și îngropați în Cimitirul de Sus: Ilie Nicolae - 27 de ani (Grădiștea - Vâlcea); Ilie Stan - 26 de ani (Sutești - Vâlcea), Mihai Borșoiu - 25 de ani (Români - Vâlcea). În anul 1934, Societatea „Tinerimea Română” din Nădlac a ridicat în cimitir un monument al eroilor din „Marele Război”, o cruce comemorativă sfințită în 26 august 1938. (Țiucra, 1936: passim.; Marco, 2008:2). La Nădlac se află un singur mormânt al unui soldat căzut în timpul celui de-al Doilea Război Mondial - Ștefan Burlacu din Regimentul 4 Grăniceri, împușcat în 26 august 1944 de unguri în dreptul Pichetului de Grăniceri din Nădlac (sălașul nr. 77). Mormântul este plasat în apropierea monumentului. Totodată, în curtea bisericii ortodoxe, există două troițecenotaf: prima cruce, din lemn, a fost ridicată în amintirea lui Lazăr Mărginean, soldat voluntar în armata română (în vara anului 1942); a doua troiță, de marmură albă, a fost ridicată în memoria soldatului-erou Ilie Stroia (1944).

Cât despre prezența multimedia, există o filmare cu drona postată pe youtube care survolează toată localitatea, dar scopul nu este să evidențieze cimitirul.

#### ***4. Importanța patrimonială a cimitirului (din perspectivă arhitecturală, culturală, a istoriei locale sau naționale/internaționale, chiar și din perspectiva habitatului natural)***

Localitatea Nădlac a fost prezentă mereu în vârtoarea evenimentelor - de la năvălirile străine până la răscoale, revoluții și războaie, locuitorii acestei zone au participat direct sau au fost doar martori ai evenimentelor. Deseori, doar arhivele mai pot releva ascunsele mărturii ale timpului, iar documentele trebuie coroborate cu ceea ce s-a păstrat în memoria comunității, dar și cu surse inedite - cum este materialul litic prezent în cimitire. Structura specifică a unei pietre tombale ortodoxe nădlăcane reprezintă o radiografiere a unor elemente clare pentru biografia decedatului (nume și prenume, când s-a născut și când a murit), dar și ale relațiilor de rudenie (de obicei, pe soclu, pe lângă formula-standard „Fie-i țărâna ușoară!” sau „Odihnească-se în pace!” sunt enumerați cei care au participat la ridicarea pietrei sepulcrale, cu gradul de rudenie: părinți, frați și surori, gineri, socri, cumnați, nepoți și nepoate). De asemenea, are relevanță faptul că pentru femeile decedate se trece familia de proveniență (numele de fată) - semn că relațiile de rudenie încă sunt importante în zonă. Aproape mereu pe crucile de dinaintea de 1990 este trecut întâi soțul și, ulterior, soția (chiar dacă au murit în ordine inversă). Această practică reflectă statutul femeii în familia tradițională, dar și faptul că, deseori, crucea era făcută/comandată din timp și doar decesul era înregistrat ulterior. Tot pe soclu apar trimiteri spre meșterii/atelierele care au realizat pietrele tombale: fie în Nădlac (Polgar, ulterior Doval), fie în Periam (interesantă opțiune dacă qqne gândim că este o localitate situată pe malul celălalt al Mureșului), fie în Arad (frații Rosza sau Mauritz-Wilchard) sau chiar în Timișoara (Granofsky).

*a)personalități/elemente comemorative individuale sau ale comunității (când este luat cimitirul ca punct de reper în calendarul liturgic/popular/al comunității/al familiei)*

Specificul comunității nădlăcane ortodoxe este și apariția ritului funerar din perioada pascală: „Păștile” (sau „Paștile mici”) se țin în Duminica Tomii: se roșesc ouă pentru pomană, se mai dau felii de colac/cozonac și/sau dulciuri celor prezenți în cimitir, după ce se merge la „morminți”. Această comemorare are loc în județele Arad (în satele de pe toată valea Mureșului inferior), Timiș, Bihor, dar și în comunitățile românești din preajma graniței cu Ungaria. De asemenea, se merge „la morminți” și de Luminăție (fenomenul a luat amploare după 1989), dar și de Crăciun – tot mai multe morminte au crenguțe împodobite sau coronițe festive – o posibilă deplasare a conceptului ancestral de sărbătorire „împreună cu morții”.

La nivelul elitelor (înțelese ca grupuri/categorii care influențează viața comunității), se pot aminti familii cu rezonanță istorică pe plan național, regional și/sau local: fam.Șerban, fam.Luțai, fam.Lugojan, Uroș Totorean, fam.Șterca Șuluțiu, fam.Brătianu, fam.Chicin, fam.Roman etc. Cred că numele „Șerban” este cel mai rezonant:



**Imagine 6: Cruce fam. Șerban**

Monumentul a fost restaurat în urmă cu câțiva ani de Asociația „Junii nădlăcani”, s-a păstrat forma de cruce supraînălțată, dar s-a înlocuit atât materialul (marmură în loc de beton), cât și modelul (crucea inițială avea ornamente vegetale și volute stilizate). Se remarcă blazonul familiei, același ca la cavoul familiei din Cimitirul Central din Cluj-Napoca (unde este înmormântat și Mihai Adrian Șerban, nepotul preotului nădlăcan), deoarece familia - originară din Cernești, Țara Chioarului - este recunoscută ca ascendență din secolul al XVII-lea de principele Gabriel Bathory (Pușcariu, 2006:65, 349): în scutul triunghiular apar trei piscuri muntoase peste care pare a sări o căprioară/un cerb; volutele care încadrează câmpul heraldic pornesc dintr-o vizieră cavalească, cu coroană terminată prin cinci cruci. Iată câteva date relevante pentru această familie și pentru destinul comunității nădlăcane: căsătorit cu fiica preotului din localitate, preotul George/Gheorghe Șerban are cea mai longevivă păstorire în localitate (57 de ani) și s-a implicat în diferite acțiuni social-culturale - înființarea școlii a III-a „în suburbiul bujiacu”, construirea sălii pentru comitetul parohial, renovarea („restabilirea și

edificarea”) sălii de învățământ de la școala superioară centrală; organizarea documentelor privind fondurile bisericești și școlare, înființarea unui fond școlar (destinat școlii și întreținerii dascălilor) (Țiucra, 1936: 383, Vesa, 2006:642, Marco, 2012; Ciorca, 2017:183).

Medicul Paul Oprișa, medic de circumscripție al Nădlacului (1893-1938), decorat cu ordinul „Steaua României” în grad de cavaler; fiul acestuia a fost în perioada comunistă medic veterinar tot în Nădlac. Pe soclu apare precizat „Îl deplâng soția născ./Maria Ghiurcoviciu/1899-1962/și fiul Pavel.”



*Imagine 7 și 8: Mormântul medicului Paul Oprișa*

Alăturat este mormântul familiei Dimitrie și Elena Chicin, părinții încadrând mormântul fiului mort înainte de vreme: Ioan Chicin „profesor,/ licențiat al Academiei de Înalte/studii comerciale și industriale/ mort la 3 Febr.1935/în etate de 26 de ani.”



*Imagine 9 și 10: Mormântul familiei Chicin*

Pe următorul rând, chiar spre alee, este obeliscul de granit gri-petrol al **dr.Remus Chicin**, notar public (1875-1945) – simplu și doar pe soclu apare „dedicația” soției, Silvia: „În amintirea bunătății tale”. În diagonală dreapta, în fundal, se observă tot o placă funerară [cenotaf după date; puțin probabil să îi fi fost aduse rămășițele în acest cimitir] de marmură/granit negru, pe

care apare scris: „Dr.Aurel Mărginean/medic asistent ces.reg./mort la 1.aprilie,1915,/în etate de 30 ani,/în spitalul militar din Vinkovici,/căzând jertfă chemării/sale de medic.” Pe soclu apar rudele: „Îl deplâng nemângâiați părinții Dimitrie și Mitra,/ fratele Traian și sora Livia”.



*Imagine 11 și 12: Mormântul medicului Aurel Mărginean*

Originar din Nădlac este și Trifon Lugojan, cunoscut în mediul bisericesc pentru partitura muzicală pentru liturghia ortodoxă, părinții săi se odihnesc pe prima parcelă a acestui cimitir: *Aici odihnesc/IOAN LUGOJAN/1870-1925/CORNELIA ELENA LUGOJAN/NĂSC. BOBLOGAN/1880-1917.*

Monumentul **familiei Ștefan Luțai**, cu balustradele în trepte de beton, combinate cu plăcile de marmură/granit negru și străjuit de urne de marmură albă, atestă tot importanța pe care familia o manifesta în comunitate (posibile legături de rudenie și cu Vasile Goldiș prin soția acestuia, născ.Luțai): Teresia dr.Luțai (1899-1988); dr.Cornel Luțai (1889-1968) (Livia Luțai). Dr.Weissblatt Aglaie (născ.Luțai) (1925-2008); Ștefan (Teofan) Luțai (născ.2 iunie 1849 – răpos. 19 decembrie 1919), Elena Chicin măr.Ștefan T.Luțai (născ.6 ian.1861 – răpos.31 mai 1920); Iulian Luțai (născ.29 noi.1882 – căzut în 11 noi.1914 ca erou pe câmpul de luptă în Sârbia). Cu alte cuvinte, pentru fiul familiei – probabil doar pomenirea pe placa funerară (cenotaf), mai ales că nu se precizează locul bătăliei.

Nu în ultimul rând, trebuie amintit mormântul lui Uroș Pătean (1875-1924) membru al Sfatului Țării de la Sibiu (1918-1919). Soldat de formație, a jucat un rol important în mobilizarea populației din zona Nădlac-Șeitin, a fost și în Gărzile Naționale. În 2018 i s-a renovat placa funerară de către Asociația Culturală „Junii Nădlacului” și s-a arborat stindardul tricolor pentru a marca participarea activă a acestuia la Unirea din 1918. Este același tip de manifestare care a marcat și în Arad traseele Unirii (elaborate de istoricul Corneliu Pădurean în colaborare cu Ministerul Culturii și cu autoritățile locale) – punctul final al acestora este în Cimitirul „Eternitatea”, unde se regăsesc înmormântați așa-numiții „corifei” ai Unirii (Ștefan Cicio-Pop, Vasile Goldiș, Ioan Suciu, Iustin Marșieu); la mormântul fiecăruia există o placă pe

care sunt trecute date biografice și contribuțiile cultural-politice.

Se spune că Uroș Pătean ar fi murit în condiții neelucidate [conform interviuatului M.T.], deoarece a fost accidentat de o mașină (informațiile nu concordă privind locul decesului: interviuata pomenea de Nădlac, pe Wikipedia este specificat ca loc al decesului Cluj-Napoca). Tot în 2008, în Parcul Central al orașului a fost dezvelit bustul acestuia, alături de cel al preotului slovac Ludovic B'oor (comunitatea slovacă a militat inițial pentru unirea într-un Regat al Slavilor, iar ulterior au acceptat o variantă mai pragmatică și au cerut să se unească și ei cu România – o delegație a comunității nădlăcane a fost la Conferința de la Paris – deplasare sponsorizată de Zemleky, care a vândut 30 de ha de pământ; însă, doar comunitatea din Nădlac a rămas în România și a prosperat, comunitățile din Totkomlos și din Bekescsaba azi s-au redus numeric).

*b) se analizează cimitirul din perspectiva artei și a arhitecturii funerare, încercând să se identifice stiluri reprezentative, componente specifice, chiar dacă apar elemente ce țin de așa-numitele „arte minore” (ornamentică, gravură, chenare, fotoceramică etc.)*

*\*ce tipuri de morminte apar?*

Corelat cu tipologia propusă în general în prima parte a proiectului de cercetare, cele mai multe plăci funerare din zona ortodoxă respectă o formă specifică, indiferent că sunt din beton sau din marmură (vezi foto mormânt Uroș Pătean): structura dreptunghiulară ca o aediculă stilizată, în partea de sus cu frontonul de cele mai multe ori rotunjit și finalizat cu o cruce grecească (cu brațe egale). Chenarul pentru inscripționare este marcat pe laterale de colonete cu model răsucit, iar pe soclu se plasează informații dinspre lumea „celor vii” – cine a ridicat piatra, ce atelier. Unele cruci au și fotografia decedatului, dar nu este o regulă. Dacă nu au acoperit mormântul cu o placă de beton, urmașii preferă să sădească plante perene cu sau fără flori.

Modelele și excepții în acest cimitir țin mai degrabă de familiile de „seamă” din localitate (până în 2000); ulterior, numeroase familii au ales ostentativ monumente funerare care mai de care mai luxoase, mai vizibile - într-o încercare de a marca ierarhia celor „morți” altfel decât ierarhia celor „vi” sau memoria colectivă.

*c) însemnele identitare personale/profesionale/confesionale/comunitare*

\*Din analiza inscripțiilor/epitafurilor (punctul de plecare sunt lucrările Mihaelei Grancea), se remarcă mormintele care precizează și profesia (de obicei, cele „elitiste”: profesor, doctor, notar, avocat) - este o tendință specifică întregului secol XX. Probabil că această aglomerare a discursului se petrece și pe fondul letrizării societății rurale – pe crucile de lemn (puține rămase) apar doar numele și prenumele, anul nașterii și al decesului (eventual vârsta).

Din analiza fotografiilor pe suport ceramic, se observă faptul că, uneori, există decalaj și nu apropiere între fotografie și vârsta celui decedat; nu apar elemente de fundal în fotografie; ca particularități vestimentare se observă preferința pentru batic (la femeile mai în vârstă) sau pentru hainele „nemțești” (vestonul bărbătesc), iar pe cap au căciulă sau sunt cu capul gol.



*Imagine 13: Exemple de fotografii*

Acestea au fost doar câteva exemplificări pentru capacitatea cimitirului de a construi o „sociogramă” a comunității (mai ales rurale) pe baza „vecinătăților”, dar și a alegerilor tombale este evidentă, patrimonial vorbind nu doar mormintele „elitelor” având relevanță, ci întregul peisaj cultural cimiterial.

Prin urmare, după o perioadă de reorganizare, de ocultare, de marginalizare a cimitirului - mai ales în habitatul urban -, de transformare (nereușită) într-un nonloc, parcursul poate avea un posibil final optimist: de la fenomenul marginalizării și al perisabilității se insistă spre o potențială regăsire de sine la nivel patrimonial, nu doar la nivelul valorii individuale, strict familiale. Între dimensiunea istoricității și cea a memoriei, acest parcurs se conceptualizează azi inclusiv în ceea ce se numește „turism genealogic” (a vizita locurile strămoșilor, inclusiv mormintele acestora), nu doar în procesul de restaurare a unor pietre funerare (precum cele din cimitirul evreiesc de la Alba Iulia, proiect demarat la nivel universitar de aproximativ doi ani) sau în organizarea unor concerte simfonice tematice (de „Luminație” în Cluj-Napoca).

De la spațiu al comemorării (funcția de durabilitate) la marcă a statutului familial (funcția de identificare, dar și funcția identitară, diferențiind subtil sau mai evident comunitățile), de la spațiu al vizitării comemorative sau turistice (funcția evocatoare și a interacțiunii), cimitirul ajunge să adopte chiar și atribute care nu par la prima vedere proprii acestuia: spațiu de joacă, spațiu al îndrăgostiților, spațiu de promenadă, spațiu de tranzit între două zone, spațiu comercial, chiar spațiu de învățare pentru studenți etc. Cu alte cuvinte, devine ceea ce numește Foucault „spațiu altfel” (adică trăit, experimentat, gândit ori reconstruit altfel/diferit), adoptând o funcție compensatorie, opusă uniformizării și regularizării.

Și totuși, paradoxal, cimitirul poate fi considerat - în formula sa actuală - mai mult un proiect și un concept specific modernității (ca epocă fixată lax la începutul secolului al XVIII-lea). Acest apanaj al modernității provine tocmai din faptul că din spațiu prin excelență sacru și controlat din punct de vedere parohial/ecleziastic se laicizează, ca spațiu ex-portat în țesutul urban, în perimetrul locuibil. Dacă în secolele XIX-XX (până în 1989), cimitirul beneficia de o stereotipie înglobantă tradiției, actualmente cred că păcătuiește printr-o „pseudolegitimare”. Numărul limitat de oferte funerare, conjugat cu nevoia de individualizare excesivă a „memorialului” (personal sau familial) atinge deseori sfera kitsch-ului (care este, totuși, o marcă societală pe care nu o putem anula din proiectul de cercetare).

Dacă în secolele XIX-XX (până la al Doilea Război Mondial), mormântul se impunea ca element elitist (confirmat de colectivitatea-memorie și de biografia decedatului, funcționând



ca „loc al memoriei tuturor”, al intermemoriei), actualmente este un monument „pseudoelitist”. Se sacrifică frecvent caracterul de „con-templum”, de întâlnire cu sacrul, de spațiu al cugetării („memento mori”) și cel de „document comunitar” sau de „condensator social” în favoarea exhibiționării egoului.

În ciuda acestor tendințe de spulberare a ceea ce înseamnă cimitirul tradițional (spațiu „oglină a unei comunități”) în favoarea individualismului, cimitirul cred că rămâne o SEMIOSFERĂ, concept prin care Lotman definește un spațiu semiotic unificator, necesar existenței și funcționării unor limbaje divergente. Stereotipia sau prea evidentă originalitate, grandoarea sau sacrificarea tradițiilor funerare în numele unor mode nu anulează capacitatea cimitirului de a funcționa conform atributelor sale primordiale: funcția de identificare, funcția evocatoare, funcția de durabilitate.

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## LITERARY CONSUMPTION AND SOCIETY (THE SECOND PART OF 19S CENTURY)

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**Abstract:** *In the Romanian society from Transylvania, in the second part of the 19th century, there was registered an 80% rural population, with an analphabetism rate of more than 70%, predominantly for women. This situation, of such low cultural and educational level, shows a desperate need for an increase in literacy and its development in all public domains. Great efforts have been made for raising the level of basic literacy in this demographic area, in the context of ethnic mixture and on the road to define a unique Romanian language with Latin alphabet. Was this evolution possible? The developing projects with a real impact in evolution were not necessarily organized by the central level, but often by - at the level of community - the priest and the primary teacher, or by some associations like the Transylvanian Association for Literature and Culture of Romanian People (ASTRA). The tools used to achieve those dreams were: inauguration of small popular libraries, the organization of conferences, talks, debates, creating schools for adults and kids - all adapted to the level and interest of rural communities. The Romanian book production from Transylvania was very strongly tied to the activity of this organization. Trying to reconstruct the topic of books, the paper is showing a repertory about circulation, accessibility of books from Romanian peasants of 1850-1900s. It contains almost 1000 titles, organized by domains and represents the consequence of research reviews and papers from that time. The taxonomy of this material offers readers an idea about mass characteristics, about literary taste and social environment, offers deduction of the way to live, daily history. Also, analyzes the motivation and context of reading. From those roles, generally, the book represents a file of history not just of Romanian books, but a file from the history of our people. This research motivates, argues to lecturers the indubitable relation established between the literary productions and consumption, on one side, and the image of society (every one society) and even the economic stage, on the other side.*

**Keywords:** books, rural society, reading, ASTRA

### Introducere

Lucrarea de față încearcă să ofere cititorilor imaginea unei lumi pe fundamentul căreia s-a constituit societatea actuală, precedând cu mult generației digitale, în care nevoile de a fi uniți prin limbă, cultură și neam au fost prioritatea vieții așa cum azi, nevoile de a ține pasul cu tehnologia și de a ne conecta prin aceasta sunt mod de împlinire a existenței. În studiul tipologiei și circulației cărților desprindem câteva noțiuni, teze, aflate în directă legătură cu specificul societății rurale transilvănene ale celei de-a doua jumătăți de secol XIX. Venind dinspre public, dorința de publicare în limba română și luând în considerare perioada - anterioară unificării naționale, cărțile și gazetăria în limba maternă au fost câteva din armele cele mai puternice care au facilitat împărtășirea aceluiași valori naționale în toate zonele locuite de români. În afară de a fi o cronică a timpului, ideea de carte este exprimată în acest material luând forme ale percepției și înțelegerii de către publicul rural, la care ne raportăm.

#### *Cercetări taxonomice și de semnificație*

Nobilă preocupare, lectura nu poate fi luată în considerare la modul general, decât diferențiată pe: mediul de viață, grupuri socio-profesionale, demografice, religioase, genetice. Preferințele de lectură își lasă, indubitabil, amprenta asupra firii umane iar gustul literar

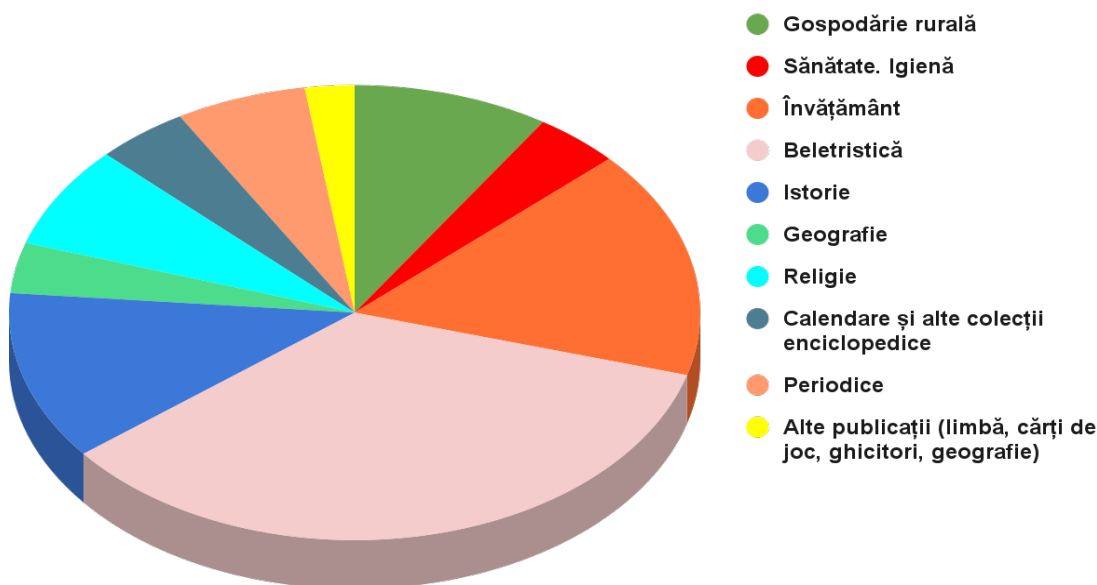
caracterizează persoana (în extensie masele) într-un fel anume și, în sens mai larg, îl transpune într-o tipologie sau alta (Manguel, 2011). Tipologia cărților și periodicelor care au circulat în mediul sătesc în perioada de referință oferă istoriei șansa de a forma o imagine asupra tabloului bogat, complex, al lumii rurale transilvănene. Cărțile lecturate denotă: nevoile, gusturile, oportunitățile de lectură – în sens reversibil, influențându-se într-o mișcare permanentă de cerere - ofertă. Studiate, toate cărțile unui eșantion, precum ale perioadei și mediului cercetate, reprezintă transmiterea unui mesaj complex sau chiar o caracterizare a unei etape din existența poporului nostru, „o reconstituire cel puțin parțială a universului spiritual și mental al societății românești” (Radosav, 1995, p. 241).

#### *Tipuri de carte după conținut*

Cărțile în sine, „consumate” și publicate reprezintă eșantionul care evidențiază cel mai clar aria de interes livresc a sătenilor români transilvăneni în a doua jumătate de secol XIX. După alcătuirea, titlu cu titlu, a fondului de carte, taxonomia a venit aranjată în 10 categorii. Unele (îndeosebi cele din învățământ) au fost editate de mai multe ori datorită uzurii dar (firese) au fost numărate o singură dată. Cercetarea cuprinde titlurile de cărți (predominante), ziare și reviste (în total de aproape 1000) care au circulat în mediul rural, cu o frecvență mai mare sau mai mică, în micile biblioteci sătești, școlare, prin parohie sau în interiorul căminului familial. Acestea s-au publicat și au fost oferite lumii pentru a contribui la culturalizarea maselor în perioada premergătoare anului 1900 și au circulat automat și ulterior, mai ales în prima parte a secolului XX. Multe dintre ele, deducem din context sau titlu, au fost scrise în mod special pentru poporul rural sau adaptate, având un limbaj mai simplu, mai accesibil.

În funcție de domeniu, cele 948 de scrieri rezultate din studiu au fost împărțite astfel:

- I. Gospodăria rurală (87 titluri), cu
  - I.1. Agricultură,
  - I.2. Creșterea animalelor,
  - I.3. Noțiuni de economie,
  - I.4. Învățăture practice, casnice;
- II. Sănătate, igienă (38 titluri);
- III. Învățământ (154 titluri), cu
  - III.1. Pedagogie,
  - III.2. Manuale;
- IV. Beletristică (331 titluri), cu
  - IV.1. Literatură română cultă,
  - IV.2. Literatură română populară, folclor,
  - IV.3. Traduceri din literatura universală;
- V. Istorie (114 titluri);
- VI. Geografie (34 titluri);
- VII. Religie (69 titluri);
- VIII. Calendare și alte colecții enciclopedice din mai multe domenii (41 titluri);
- IX. Periodice (58 titluri);
- X. Alte publicații (22 titluri).



**Figura 1. Repertoriul publicațiilor accesibile mediului rural în perioada anilor 1868 – 1900**

Dacă facem o secționare în monografia ruralului vedem că aceasta este slab îmbogățită de tipărituri înainte de activitățile ASTREI iar aportul cel mai puternic al cărții care poate produce o schimbare în viața oamenilor este dat de acele publicații scrise anume pentru săteni, literar-istorice, agrare, practice sau religioase. Modernizarea economică rurală nu s-a putut realiza separat sau fără vreo relație de directă proporționalitate cu ridicarea nivelului de alfabetizare și culturalizare a maselor (Matei, 1986).

Deși categoria cărților religioase a fost mai prezentă în viața populației decât reiese din studiul efectuat, cărțile de rugăciuni, psaltirea, legende, cărțile talisman, au fost adesea moștenite în familie sau au fost copiate, încă, îndeosebi în comunitățile cele mai periferice. Diagrama reflectă statutul cărților publicate, iar consumul și rata de lectură sunt de abia până la un anumit punct oglindite în producția editorială. Luând în considerare și cartea orală, tabloul fondului de lectură este variabil și foarte bogat.

Eșantionul literaturii, beletristicii, care detașat conduce numeric, cuprinde atât literatura noastră cât și cea universală, special tradusă în conformitate cu limbajul popular. Centrele producătoare de carte au mizat pe ușurința de a învăța istoria folosind literatura, legende; așadar, acest domeniu înglobează și cărți de literatură istorică.

În unele cazuri, deprinderea scrisului și cititului a fost organizată inclusiv pentru adulți, alături de învățarea chestiunilor utile gospodăriei prin conferințe, prelegeri, în locații precum: școlile ASTREI, în cadrul bisericii, în căminul cultural, în grupuri private, unii de la alții, prin învățare empirică. Domeniile preferate au fost cele calendaristice, practice, agrare, literare, religioase. Numeric vorbind, repertoriul arată literatura pe primul loc. Locul fruntaș urmat de publicațiile didactice, pedagogice cuprinde atât manualele cât și cărțile de tehnică didactică. Ținând cont de faptul că au fost consumate propriu-zis în cadrul formal, în școală, necesitând alfabetizarea elementară înaintea unei lecturi voluntare a cărții, lectura liberă și voluntară cea mai frecventă a fost, totuși, cea religioasă.

#### *Fețele cărții și sociologia gustului literar*

Ținând cont de sociologia gustului literar, consumul de carte (în mediul rural și nu numai) se poate stabili în urma unor factori variabili:

1. *difuzarea cantității și tipului de carte*, facilitatea de a procura cartea sau de a ajunge în posibilitatea de a o lectura (sau asculta în contexte precum familia, situație în care deseori citea

o singură persoană fie din cauza neștiinței de carte a altor membri dar și din obișnuință, la biserică sau școală dacă lectura se coordona de către membri ai corpului parohial precum diacul, diaconul);

2. *motivația lectorilor* de a (re)citi sau povesti o carte, o parte din carte. Un context de citire poate fi generat de plăcerea provocată de actul lecturii în sine, de utilitatea pe care informațiile astfel obținute pot fi aplicate în viața practică a oamenilor simpli, de curiozitatea cititorului de a afla lucruri noi din domenii precum istorie, geografie etc.;

3. *accesibilitatea lingvistică și semantică* a cărții (încurajarea publicării în limba română, într-o formă simplă și plăcută, măbind impactul carte - societate a făcut parte din militarea pentru alfabetizarea maselor);

4. *chestiuni domestice de organizare* (timpul, într-o familie, adulții consideră că poate fi alocat cititului). În realitatea lumii rurale, date fiind nevoile de muncă în gospodărie, dorința și mai ales posibilitatea de a învăța să scrie, să citească sau să urmeze o formă de învățământ nu reprezenta o regulă ci o reală oportunitate.

Indiferent de fețele minunate pe care le încorporează cartea, biblioteca uriașă a satului secolului al XIX-lea poate fi structurată, din punct de vedere al formei, în trei categorii: cartea tipărită, cartea transmisă oral, cartea manuscris. Catalogate, desigur, primele mai mult decât restul, dar citite și vorbite (ascultate, rostite) toate, nu putem discuta despre marea bibliotecă a săteanului român fără a lua în calcul toți acești piloni. Fiind mediul cel mai greu flexibil datorită rolului important pe care îl deține mentalitatea colectivă tradițională prin excelență, cartea transmisă pe cale orală a fost factorul maxim în suma cărților care constituie biblioteca rurală a perioadei cercetate.

Lectura de plăcere se găsește adeseori în mediul cercetat ca o complementaritate a utilului. Cartea se considera mai mult poartă spre dezvoltare deoarece nicio schimbare în societate nu a fost posibilă fără cărți. De-abia apoi reprezintă o plăcere constructivă, care poate ghida demersul vieții înspre mai bine, înspre evoluție, modernitate.

Din punct de vedere al contextului de lectură, găsim determinarea tatălui în lectura religioasă pentru toți și interpretarea în fața copiilor și tinerilor. Din punct de vedere al adultului, cartea din familie, biserică sau bibliotecă, a reprezentat șansa la educația pe tot parcursul vieții, dobândirea permanentă a înțelepciunii, înțelegerii existențiale și actualizării cunoștințelor despre ocupațiile principale. Prin conducerea discuțiilor despre cele citite în casă, părintele muncea continuu la evoluția gândirii membrilor familiei și la accentuarea moralei acesteia. Obiceiul participării la cercurile de lectură de acasă a fost și un mod de a consolida relațiile intergeneraționale în care lectorul deținea un atu al superiorității alocate și prin acest rol (Popa, 1888, pp.120-126). Din punct de vedere al grupurilor în care se citea (familiei, prietenilor, bisericii), cartea a avut rolul de *coalizator și catalizator* al membrilor, datorită discutării textelor și lecturilor cu voce tare. Cititul în intimitate nu poate oferi ad hoc un atât de mare eșantion de întrebări și răspunsuri precum într-un grup coordonat.

*Bibliofilia*, iubirea de carte, transcende toate funcțiile pe care le deține cartea prețuită, atât datorită rarității acesteia dar și calității fizice și de conținut. Considerațiile poporului vis-a-vis de carte intră în zona respectului, încrederii în cele scrise, nevoii imediate de a o conserva cât mai mult timp, bucuriei de a o lectura. Aproape venerație a cărții putem spune, se găsește și la familii renumite. Alisandru Mocioni, la primirea din partea tatălui a unui jurnal destinat notițelor de la școală (obiect rar pentru acel timp), descrie frumusețea legăturii și a foilor albe, destinate notării lucrurilor importante (Popa, 1888, p. 7). Viața cărții este conferită propriu-zis de către lectură, ea existând atâta timp cât este citită. Însemnări în acest sens au fost găsite pe margini sau pe paginile de gardă, în interiorul copertilor. Iubirea de carte determină și durata vieții. Deși este, oarecum, imposibil de stabilit pentru cartea vorbită, orală, încântătoare a ethosului popular, au fost alocați aproximativ între 10 și 80 de ani pentru cartea tipărită. După

cum aflăm din cercetările istoricului Doru Radosav, conform notelor scrise de către cititorii proprietari pe marginea paginilor, cărțile religioase depășesc cu ușurință 50 de ani: „În primăvara anului 1951 (s.n.) a fost friguroasă până în perioada Strasnicului a fost frig și zăpadă pe dealuri” - mențiune de pe cartea *Penticostar*, tipărit în Sibiu în anul 1805 și găsit în localitatea Lechința (Radosav, 1995, pp. 209-210).

*Conștiința, spiritualitatea vie în teritoriul limbii române* a fost întreținută de circulația publicațiilor în provinciile proprii dar și de circulația acestora între regiuni, de curtoazia pe care personalitățile din domeniul umanist au întreținut-o. Deși aflată sub imperiu, Transilvania a fost cunoscută prin scriitorii săi, până la Dunăre și peste Prut. În mod deosebit era cunoscut poetul Octavian Goga, care, din anul 1905 (publicarea volumului de debut în versuri), presa literară îl prezintă ca pe o oglindă a locuitorilor din toate teritoriile aspirante la o Românie liberă și coalizată. Literatura înțelegea de toate mediile socio-profesionale, ajunsă în toate satele și orașele, arată elementele esențiale ale spiritului și gândului comunității românești: „O întreagă viață națională curgea în cuprinsul lor, viața Ardealului asuprit, acolo unde învățătorul era stejarul păstrător al limbii și istoriei românești, plugarul o garanție a existenței etnice, preotul un apostol al naționalității” (Bulei, 2004, p. 97). Nimic nu reflectă mai fidel decât autorul Ion Bulei emoția comună adânc încimentată a poporului român și împărtășirea ei prin carte, cu semenii din toate județele românești (Bulei, 2004). Octavian Goga este distins de către Academia Română cu premiul Năsturel-Herescu în anul 1906, premiu înmănat de către Ion Bianu, în urma susținerii pe care a avut-o din partea criticului literar Titu Maiorescu. Regăsirea fiecărui român, în cuvinte atât de armonios îmbinate, a lăsat incontestabilă afirmația că poezia Goga este vocea neamului, îndeosebi a neamului transilvănean, aflat în amenințare politică și temându-se de absorbția națională, de eradicarea identității românești. Cu atât mai mult și din această cauză, cărțile românești pentru săteni adică pentru majoritatea poporului, au fost elementul care ne-a permis să existăm.

Unul din filioanele pe care omul comun l-a exploatat prin simțurile sale a fost acela de *consolidare a unității poporului în jurul cărții*, dovadă fiind mențiunile care au însoțit donațiile de carte fie către biserici, strănă, biblioteci, donații care specifică dorința insistentă de a rămâne cartea acolo atâta timp cât vor exista români sau pe toată existența poporului sau a bisericii etc. (Radosav, 1997). Unitatea de neam, speranță accentuată în perioada Școlii Ardelene, în Iluminism, s-a înfăptuit ulterior și prin propagarea limbii și istoriei românești în toate provinciile. Modul în care cărțile au fost percepute denotă valoarea lor imaterială dar și materială dată de prețul cărților. Donațiile sau moștenirile de carte se făceau cu titlul de mare importanță. Nerespectarea beneficiarului sau eventuala sustragere a cărților putea fi sub pericolul unor blesteme de-a dreptul. Actul lăudabil și cu bună imagine în comună cuprinde atât religiozitate prin efortul material, cât și păgânism prin apostrofările amintite dar relevă valorile de maximă importanță pe care comunitățile rurale le alocuau ideii de carte. Totodată se făcea o distincție între cărțile parohiale (care nu pot fi înstrăinate prin niciun mijloc) și cărțile poporului, ale satului, poate din bibliotecile parohiale, survenind diferența, chiar în cadrul bisericii, între cartea specială, „de neatins” de către popor și cartea ce poate fi împrumutată.

Acțiuni de culturalizare și uniune națională au fost inițiate și de alte asociații cu aproximativ aceleași obiective astriste, precum „Societatea pentru fond de teatru român”. Cu sediul la Budapesta apoi la Brașov, a încurajat populația să pună în scenă piese scrise de autori români, în diverse locații. Adunări, conferințe, concerte, banchete au fost susținute în mai multe centre ale teritoriilor din Transilvania și Ungaria, încurajând populația să își permită manifestările culturale, dramaturgice, precum și întâlnirile cu alți români din Regat. Filialele au fost reprezentate de către membri ai politicii naționaliste din localități, măsuri care au contribuit la promovarea culturii naționale și la o atitudine proactivă. Dintre reprezentanți ai societății au fost: Aurel Lascăr (Oradea), Ilie Dăianu (Cluj), Augustin Nicoară (Deva), Sergiu Median (Sebeș), Miron Cristea (Sibiu). (Bulei, 1984) Măsuri precum înființarea teatrului

român, înregistrarea dialectelor limbii române, a cântecelor populare au fost unele dintre acțiunile pe care le-au pus în practică, înainte ca autoritățile să împiedice amploarea societății. Cultura proprie a devenit astfel un pericol al direcției de maghiarizare din Transilvania.

Specificul lecturilor mediului rural dezvăluie nu doar gustul literar al perioadei și al categoriei de cititori, ci și modul de a trăi, întrucât omul simplu avea ca lecturi principale cărțile, revistele, calendarele din care sustrăgea informații utile în munca sa și cele care îl apropiu de divinitate.

Din punct de vedere religios, cartea a fost, pentru țăranul român, *matricea de păstrare și transmitere a credinței* și bisericii spirituale peste timpuri. Majoritatea scrierilor au fost, deocamdată în acest veac, de natură religioasă evaluând numeric circulația acestora în orice formă și, mai ales, lectura lor. Din prisma intimității, lectura cărții, respectiv rugăciunea și citirea psalmilor, evangheliilor, a legendelor ș.a., au semnatificat (și semnifică) o cale de manifestare a pioșeniei, devoțiunii, dialogului personal, comuniunii cu divinitatea. Cartea a fost considerată un *obiect sacru* iar *scrisul* este de origine *divină* (Radosav, 1997). Fiind mediul cel mai tradițional, satul a păstrat parțial aceste credințe, chiar dacă uneori se află la limita canoanelor bisericești.

Desigur, cartea a fost mereu și un *obiect comercial*, atât în epoca Gutenberg, cât și, mai ales, înainte, datorită costului ridicat de producție (scriere, legătorie, copertare). Posibilitatea de a avea sau dona o carte a fost apanajul claselor sociale ridicate sau medii. Valoarea mare a cărților a crescut prestigiul bibliotecilor dar valoarea mică a facilitat accesibilitatea oamenilor simpli la cărți și alte publicații ale timpului.

Prin folosirea limbii materne și unificarea normelor lingvistice, cartea a fost *o armă a unificării culturale a românilor*, aspirând la apartenența la aceeași țară. Alfabetizarea oamenilor nu a fost doar un semn de civilizație, de elitism ci și un mijloc de conservare a istoriei poporului și de *unire prin limbă*. Există în literatura topicului și asocierea între ortodoxism și limba română, impunerea acestora fermă fiind în antiteză cu limbile slavonă, maghiară subânțelegându-se și ne-catolicismul (Leu, 1996). Cu toate că provinciile românești nu aveau aceeași conducere și religia predominantă sau impusă a diferit, cărțile au circulat dincolo și dincoace de Porțile de Fier ale Transilvaniei. Banatul avea tipografiile sale dar a primit cu bucurie apariții de la Blaj și invers, grație solidarității etno-lingvistice, dorinței populației de a citi orice carte scrisă în limba românească. Chiar dacă nu se știe, numeric, în ce măsură au fost duse cărțile românești ardelenene în restul țării, cel puțin în Banat au fost regăsite în număr mare și personalități din lumea literelor au efectuat deseori vizite culturale. Unele dintre cele mai populare publicații ardelenesti cu circulație în secolul al XIX-lea în comunitățile bănățene sunt: *Biblia*, *Gramatica româno-nemțească*, *Istoria românilor*, *Prediche* (tipărite în Buda), *Calendariu de o sută de ani*, *Geografia românească*, *Pedagogia* (Brașov), *Propovedaniile la îngropăciunea oamenilor morți* (Buda, 1809), *Didahii adecă învățături pentru creșterea fiilor* (Buda, 1809), *Istoria pentru începutul românilor în Dachia* (Buda, 1812), *Istoria Bisericii Românești* (Buda, 1813), *Lexiconul împreună cu Ortografia română sive latino valachica* și *Dialog pentru începutul limbii românești* (1825). Acestea, regăsite atât în sate, cât și în muzeele timișoreane sau reșițean, denotă marea apreciere și recunoaștere pe care cărțile din Transilvania le-au primit. Oamenii le-au prețuit astfel că au circulat în toate mediile socio-demografice (Leu, 1996, pp. 75-76, 189-191).

Cartea este *echivalentă a înțelepciunii*, pasiunea arătată cunoașterii, cărților ca și simbol al civilizației, sunt percepții care converg spre ideea că, cele ce conduc și schimbă soarta națiunii, nu doar a individului, sunt cărțile. Persoanele care aveau obiceiul de a citi au fost considerate deschizătoare de uși, luau decizii bune, erau lideri respectați în comunitate.

Cartea ca și *exprimare a forței conducătoare* a fost recunoscută și de către săteni, cele religioase având binecuvântarea episcopilor, înalți arhierilor (le confereau o mai mare importanță culturală și materială), cele laice (domenii diverse) având fie cuvânt de mulțumire

sau explicație a contextului social, politic care a făcut posibilă apariția cărții sau manifest pentru consolidarea limbii române.

Prin funcția ei de a transmite un mesaj, cartea este o *punte peste veacuri*. Niciun alt element nu poate asigura veșnicia în așa măsură. Prin scriere, lectură și conservarea acestora, informații, mode, sentimente, gânduri, idei, istorii și istorii ale istoriilor sunt regăsite peste veacuri: „Tot ceea ce se consideră memorabil își găsea astfel, prin scris, calea sigură spre generațiile viitoare, spre eternitate în fapt” (Leu, p. 121).

### **Metodologie**

Articolul a debutat prin cercetarea, întâi de toate a *Revistei Transilvania: organ al ASTREI*, colecția anilor 1868-1900 (respectiv primii 31 ani de apariție), îndeosebi secțiunile „Literarium” și „Bibliografia”. Foarte cuprinzător a fost „Repertoriul de cărți pentru bibliotecile populare ale Asociațiunii” - articol din anul 1900 (Secretariul asociațiunii, 1900, XXXI, pp. 20-32). Utile, de asemenea, au fost diversele articole cu trimitere la publicații premiate de către Asociațiune și destinate mediului rural, sau cele care își găseau geneza în apelul ASTREI către scriitorii români sau oamenii de știință ai vremii, de a cerceta și scrie pe un anumit domeniu, uneori oferindu-se și structura sau cuprinsul cărții așteptate în concurs. A fost realizat repertoriul cărților mai sus prezentat. Pornind de la acestea și parcurgând lucrările de referință cât și alte periodice care au circulat în mediul rural, lucrarea converge înspre extragerea câtorva elemente definitorii ale societății rurale românești, din Transilvania îndeosebi.

### **Concluzii**

Propagarea cărții în mediul sătesc a fost realizată cu eforturi care au presupus și creșterea alfabetizării nu doar creșterea producției de carte și periodice iar demersurile s-au efectuat prin aportul asociațiilor precum ASTRA și ale oamenilor în masă, poate mai mult decât ale conducerii politice a țării. Luând în considerare acești factori, susținem afirmația că lectura și cartea influențează, amprentează cât se poate de serios societatea și comunitățile, aducând schimbare în viața oamenilor și ridicând, întâi intelectual și emoțional, apoi economic, nivelul de trai.

Linii directoare ale societății românești rurale transilvănene din a doua jumătate de secol XIX:

- Majoritar rurală dar cu aspirații de cunoaștere mai vaste - preocupată preponderent de scrierile agrare, literatură, religie, legende, scrieri istorice și descrieri geografice.

- Căminul familial ca și celulă de rezistență și păstrare a culturii – circulația intensă a cărților orale. Aici, în familie, se afla geneza dorințelor de școlarizare și progres.

- Viața religioasă a fost extrem de bogată, creștină și limitrofă – găsite în cartea religioasă scrisă și vorbită.

- Dorința acerbă de construire a unității prin limbă și cultură – unificarea normelor lingvistice și circulația între provincii a cărților în limba română.

- Extremă diferență între mediile sociale – cărți special comandate, premiate la publicare, cu înțeles simplu, instructive și captivante.

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# THE REACTION OF THE TRANSYLVANIAN SOCIETY REGARDING THE CIVIL LEGISLATION AT THE END OF THE 19th CENTURY

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**Abstract:** *Modernity has determined a change in the relations between the state and the Church that is more visible in terms of the attitude regarding matrimonial issues. Civil laws, which have been adopted at the end of the XIXth century, represent a new stage in the process of the marriage-related matters being established, consequently resulting in the implication of the laic power in a domain which used to be an appanage of the Church. The matrimonial legislation reflects the modernizing tendencies that affected the Transylvanian society starting with the second half of the XIXth century. What is more, its importance, from a juridical standpoint, consists of the fact that by the instrumentality of a new set of laws, the reunion of all the vast family-related matters could successfully be completed. The civil legislation has generated ample debates among public institutions, however neither the civil society, nor the ecclesiastical forums hesitated to express their points of view concerning the new legislation. The press from those particular times is able to capture inside its pages the unsettlement provoked by the introduction of civil marriage. Not only did the papers reflect a state of mind, yet they constantly tried to induce to the public opinion certain attitudes or even defense towards several problems they were facing. By addressing the matrimonial legislation in Transylvania, the tendencies of societal laicization are undeniably reflected, imposing at the same time a general perspective and uniformization. Therefore, the transformations present in the second half of the XIXth century in Transylvania brought not only change among juridical, social and economical relations, but also a modification in matrimonial behaviors and moral relationships within the community.*

**Keywords:** modernization, law, marriage, state, church

## Introducere

Modernitatea a adus o schimbare a raporturilor dintre Biserică și Stat, fiind tot mai vizibilă în ceea ce privește atitudinea față de problemele matrimoniale. Căsătoria, ca și fundament al instituției familiei, a fost administrată secole de-a rândul de către Biserică, însă în perioada modernă aceasta va intra tot mai mult sub controlul statului. Secolul al XIX-lea ne apare, din acest punct de vedere, drept perioada unei relații strânse între stat și Biserică în privința administrării vieții de familie. Articolul de față își propune să urmărească modul în care societatea a reacționat la această schimbare a rolurilor celor două instituții, statul și Biserica. Evenimentele majore ale vieții precum nașterea, căsătoria sau moartea au atras de-a lungul timpului atenția legislatorilor, care prin intermediul legilor au urmărit să cuprindă manifestările umane în cadre legale bine delimitate. Pe parcursul secolului al XIX-lea statul a căutat în permanență să-și consolideze poziția în societate și în viața individului, să redacteze și să introducă coduri civile prin care să-și extindă autoritatea.

Transformările survenite în Transilvania odată cu cea de-a doua jumătate a secolului al XIX-lea au adus nu doar o schimbare în cadrul relațiilor juridice și social-economice, ci și o modificare în comportamentele matrimoniale și în relațiile morale din cadrul comunității. Astfel, dacă până în momentul respectiv Biserica era instituția abilitată să controleze și să ofere soluții problemelor legate de naștere, căsătorie sau moarte, odată cu cea de-a doua jumătate a secolului al XIX-lea, competențele ei au fost limitate în favoarea statului și a instituțiilor sale, proces încheiat în Transilvania în anii 1894-1895 prin introducerea de către statul maghiar a

legilor matrimoniale care preluau actele stării civile și soluționarea aspectelor legate de căsătorie, viață matrimonială și divorț (Bolovan & Bolovan, 2007, p. 122).

Pe tot parcursul secolului al XIX-lea statul a căutat în permanență să-și consolideze interesele legate de corpul social, să redacteze și să introducă coduri civile care să-i extindă autoritatea și asupra unor domenii care până atunci ținuseră doar de competența Bisericii și să-i ofere astfel individului ceea ce biserica de multe ori îi nega (Bolovan, 1999, p. 146). Datorită acestei situații raporturile dintre sfera religioasă și cea laică au devenit tot mai încordate.

Implicarea statului în chestiunile matrimoniale, s-a impus așadar ca o necesitate în contextul declanșării, la jumătatea secolului al XIX-lea, a procesului de modernizare. Acest amestec al statului în „competențele exclusive” ale Bisericii a fost influențat de „șocul modernității”, de crearea unor noi premise comportamentale în sânul societății (Brie, 2009, p. 33). Legislația civilă s-a exprimat foarte clar în favoarea intereselor familiei și copiilor.

Secularizarea a dus la scăderea influenței bisericii în domeniu căsătoriei și familiei, statul preluând, treptat, cea mai mare parte a responsabilităților privitoare la legiferarea existenței domestice (Bolovan, 1999, p. 67).

În spiritul politicii absolutiste luminate, promovate de către statul austriac în perioada lui Iosif al II-lea, legislația laică lăsa impresia evidentă a amestecului statului în cele mai mici amănunte ale vieții familiei. Este drept că la început statul a încercat să-și impună percepțiile referitoare la matrimoniu tot prin legislația ecleziastică, influențând-o pe aceasta în adoptarea unor măsuri reformatoare ce vizau înlăturarea vechilor reguli canonice.

Această colaborare dintre stat și Biserică a avut drept finalitate subordonarea bisericii statului la sfârșitul secolului al XIX-lea, rolul bisericii fiind limitat la viața spirituală a individului, ea rămânând doar un izvor de mângâiere și de transmitere a valorilor creștine (Bolovan, 1994, p. 169).

Statul recunoștea Bisericii dreptul de a se ocupa de încheierea căsătoriei, de divorț în conformitate cu canoanele fiecărei confesiuni. Statul își rezerva însă dreptul de a supraveghea statutul civil și militar, relațiile dintre soț și soție, moștenirea, tutela, problema întreținerii copiilor și a soțiilor, dar și altele (Cârja & Cârja, 2005, p. 35).

Mariajul a încetat, prin legile din 1894, să mai fie condiționat de validitatea și acceptul dat de către Biserică. Astfel, în dezbaterile legislației matrimoniale laice din a doua jumătate a secolului al XIX-lea trebuie să plecăm tocmai de la această premisă: până în 1894 statul a colaborat cu Biserica în domeniul matrimonial, iar după această dată și-a asumat întreaga responsabilitate, preluând toate atribuțiile dreptului matrimonial (Brie, 2008, p. 77). Sigur că Biserica s-a simțit lezată de noua situație, însă s-a văzut nevoită să accepte competența sporită a statului în domeniul matrimonial.

Transilvania, ca spațiu multietnic și pluri-confesional prezintă o realitate în care disputele confesionale, dar și abuzurile unor preoți, au determinat autoritățile politice, din a doua jumătate a secolului al XIX-lea să elaboreze o serie de legi menite a rezolva aceste probleme (Brie, 2008 p.77). Dintre legile matrimoniale care au avut un impact deosebit asupra societății, în a doua jumătate a secolului al XIX-lea, ne vom opri la Legea XXXI (despre dreptul matrimonial), Legea XXXII (despre religiunea pruncilor) și Legea XXXIII (despre matricolele de stat), promulgate la 9 decembrie 1894.

Statul a creat un cadru legislativ general, respectat de toate confesiunile, dar care era foarte permisiv și îngăduia fiecărei comunități religioase să-și exercite o autonomie foarte largă de exprimare a propriilor percepții și crezuri (Brie, 2008, p. 78).

Legile matrimoniale elaborate în anul 1894 au fost cele mai complexe legi ce au reglementat raporturile politico-bisericești din domeniul matrimonial din a doua jumătate a secolului al XIX-lea. Prin claritatea lor, ele au reușit să pună capăt neînțelegerilor dintre autoritățile laice și cele bisericești. Mai mult, a fost tranșantă, în favoarea statului, și disputa pe

probleme matrimoniale dintre diferitele confesiuni (Brie, 2009, p. 49). Aceste legi au rămas în vigoare și la începutul secolului al XX-lea fiindu-le aduse totuși câteva amendamente.

Legislația matrimonială a fost des abordată în istoriografie, articole precum „Legislația cu caracter matrimonial la românii din Transilvania în a doua jumătate a sec. al XIX-lea” (Bolovan, 1994), „Aspecte ale ciclului vieții familiale în satul românesc din nord-vestul Transilvaniei la mijlocul secolului al XIX-lea” (Bolovan, 1995), „Biserica și familia la românii din Transilvania în secolul al XIX-lea” (Bolovan, 1999), „Căsătoriile mixte în Transilvania la sfârșitul epocii moderne. Considerații demografice” (Bolovan, 2005), „Familie și comportament matrimonial în Transilvania între 1850 și 1914 (între tradiție și modernizare)” (Bolovan, 2007) au reprezentat contribuții importante la reconstituirea ciclului vieții familiale în spațiul transilvănean. De asemenea, lucrările „Familie și societate în nord-vestul Transilvaniei: (a doua jumătate a secolului XIX - începutul secolului XX)” (Brie, 2008) și „Legislația ecleziastică și laică privind familia românească din Transilvania în a doua jumătate a secolului al XIX-lea” (Bolovan, 2009) pun la dispoziția cercetătorului legislația laică și bisericească existentă în epocă. Așadar, ne vom concentra atenția asupra modului în care societatea reacționează la aceste schimbări, asupra felului în care sunt percepute proiectele de lege de către forurile religioase dar și de către popor, dat fiind faptul că odată cu introducerea legislației civile o aprinsă dezbatere a avut loc și în paginile cotidienele transilvănene.

Presa a reușit să surprindă în paginile sale întreaga neliniște provocată de introducerea căsătoriei civile. Ziarele nu doar au reflectat o stare de spirit, ci de multe ori au încercat prin scrierile lor să inducă în opinia publică anumite atitudini sau luări de poziție față de diversele probleme cu care se confruntau.

Articolele provin din presă, căci ea este cea care ne-a oferit materialul pentru demersul de față, iar printre periodicele folosite se numără: *Familia*, *Foaia poporului*, *Gazeta Transilvaniei*, *Unirea* care au urmărit cu interes dezbaterile pe marginea legislației matrimoniale și au redat în paginile lor starea de spirit din Dieta ungurească, din rândul instituțiilor ecleziastice dar și din rândul societății.

Am recurs la analiza de conținut a articolelor din periodicele selecționate încercând să identific modul în care a fost reflectată reacția societății în general, și a Bisericii, în special, cuvintele cheie folosite pentru a transmite și întări un anumit mesaj și informația transmisă publicului cititor.

Existaseră mai multe momente când se dorise adoptarea unor legi care să impună căsătoria civilă, dar acestea fuseseră evitate atât de liberalii maghiari ai lui Tisza, cât și de opoziția catolică din Parlament. Noua legislație civilă a revenit în actualitate în vara anului 1892, în condițiile în care guvernul condus de Szapary a început să dea semne de slăbiciune din cauza eșecului propriului program de reforme. În urma căderii de la putere, sarcina de a forma guvernul i-a fost încredințată lui Wekerle Sándor, politician liberal, de confesiune catolică. Acesta a pregătit proiectele de legi politico-bisericești, considerând că actualul sistem de relații cu biserica catolică era unul anacronic, care nu corespundea cerințelor lumii moderne. Viziunea sa beneficia și de sprijinul tacit al împăratului Franz Iosif (Bolovan et al., 2009, p. 213).

Au urmat doi ani de dezbateri intense, de negocieri între părți, de luări de poziție deschise privind subiectul în care erau implicate atât autoritățile ecleziastice, guvernul și Parlamentul maghiar, Sfântul Scaun, împăratul Franz Iosif, cât și, prin intermediul presei, societatea civilă.

Presa din Transilvania a încercat prin scrierile ei să inducă opiniei publice anumite atitudini sau luări de poziție față de diversele probleme cu care se confruntau. La fel s-a întâmplat și în cazul acestei debateri, când vocea autorităților clericale a fost mai puternică, mai insistentă și mai prezentă decât cea a autorităților care doreau aprobarea legilor matrimoniale. „Guvernul unguresc vrea ca în viitor căsătoriile numai atunci să aibă valoare,

dacă se vor încheia înaintea dregătorilor statului (...) cine vrea poate să se cunună și în biserică și preoții pot să poarte și ei matricolele, dar acestea nu vor avea valoare înaintea legii” (Gazeta Transilvaniei, 1894, p. 1).

De asemenea, *Familia* informa în numărul din Ianuarie că proiectul de lege pentru introducerea căsătoriei civile frământă multe spirite în țară. „În Oradea-Mare încă s-au ținut adunări pro și contra, la aceasta din urmă luând parte și românii. Chestiunea joi s-a discutat și în adunarea municipală a orașului, cu această ocazie domnul Nicolae Diamandi a ținut un discurs, prin care a combătut proiectul ca creștin și ca român” (Familia, 1894, p. 59).

Biserica luptă împotriva degradării tainei căsătoriei cu toate mijloacele, teama ei era aceea că, cununia religioasă, „despuiată de caracterul ei sacramental va deveni o simplă ceremonie lipsită de valoare” (Gazeta Transilvaniei, 1893, p. 2). „Căsătoria civilă demoralizează moravurile, pentru că baza moralității este viața familială. Și viața familială își primește moralitatea sa de la caracterul sacru al căsătoriei. Dar căsătoria civilă despoaie matrimoniul de caracterul său sfânt și alungă pe Dumnezeu din familie” (Unirea, 1894, p. 405).

În încercarea lor de a oferi dovezi și de a demonstra natura „nocivă” a viitoarelor legi, unele foi bisericești au sugerat că de fapt în spatele acestor decrete s-ar afla o miză politică, mai exact maghiarizarea românilor. Astfel ele afirmă că matricolele civile „vor maghiariza ori cel puțin vor schimonosi numele cinstite ale familiilor noastre” (Unirea, 1893, p. 42).

Biserica a continuat să condamne tendințele statului, acuzându-l că prin acțiunile sale acesta nu urmărește decât să smulgă religia din sufletul poporului (Cosma, 2003 p. 192), pe când statul și-a motivat intruziunea, argumentând că el oferă protecție libertății individuale, menține solidaritatea familiei și oferă protecție individului față de tirania familiilor și a Bisericii (Bolovan, 1999, p. 165).

Noua lege a stârnit ample controverse și în rândul instituțiilor politice unde se duce o adevărată luptă după cum reiese și din presa vremii. În rubrica „Cronica pictată” din *Gazeta Transilvaniei* se redă starea de spirit din Dieta ungurească unde se dezbate proiectul de lege referitor la căsătoria civilă: „În Dieta ungurească s-a încins luptă mare. La ordinea zilei este faimosul proiect de lege privitor la introducerea căsătoriei civile obligatorie, care și pe ungurii i-a pus pe griji serioase.” Pe marginea proiectului de lege a vorbit printre alții și fostul ministru-președinte, conte Iuliu Szapary, care condamnă această lege pentru că „ea duce la păgânism (...) se vor afla mulți care vor zice că la botez nu mai este de lipsă preotul, deoarece este de ajuns a-l scrie numai în matricolele civile, înmormântarea încă o poate face notarul. Așadar de ce treabă mai este preotul și biserica? Noua lege va duce pe cetățeni acolo, ca să nu mai cunoască sfintele obiceiuri creștinești și să devină păgâni” (Gazeta Transilvaniei, 1894, p. 4). Este evidentă antiteza dintre căsătoria propusă de stat și căsătoria susținută de Biserică. Dacă statul vedea matrimoniul ca pe un simplu contract civil, Biserica o considera o taină.

*Foaia poporului* prezintă în paginile ei dezbaterile din Dieta din Budapesta pe baza căsătoriei civile din cadrul ședințelor de pe parcursul lunii februarie menționând că „e foarte mare numărul deputaților care doresc să vorbească pentru ori contra planului de lege, s-au înștiințat până acum peste patruzeci de deputați contra planului și tot atâta pentru el așa că dezbaterile vor fi foarte lungi” (Foaia poporului, 1894, p. 61).

Dacă în alte spații europene chestiunea căsătoriei civile a fost tranșată încă de timpuriu, în Franța ea fiind introdusă încă din timpul Revoluției franceze, în Anglia odată cu 1837, în România în 1864, iar în Germania după 1870, în Transleithania, caracterul pluri-confesional a făcut dificilă găsirea unei soluții pentru rezolvarea acestei probleme (Cosma, 2003, p. 192).

Din dorința de a argumenta faptul că legislația civilă este dăunătoare societății, deputatul Hortovdnyi Iosif vorbește contra legii, folosind ca exemplu „stricăciunile” provocate în țările în care aceasta a fost deja introdusă, arătând cu date statistice că „94% din numărul total al tâlharilor, al șarlatanilor, al copiilor vagabonzi și al altor gunoaie ale societății au a-și mulțami existența lor numai căsătoriei civile” (Gazeta Transilvaniei, 1894, p. 1).

De asemenea, aduce în discuție exemplul Germaniei unde căsătoria civilă a fost introdusă din anul 1870, spunând că părinții cununați pe această cale nu mai vor să-și boteze nici copiii, așa că „în Berlin de la anul 1875-1879, numai dintre copiii născuți din părinți protestanți au rămas nebotezați 61,47% și din copiii născuți din părinți catolici cam jumătate au rămas nebotezați, așadar căsătoria civilă duce la demoralizare și păgânism” (Gazeta Transilvaniei, 1894, p. 2).

Tot în *Gazeta Transilvaniei* întâlnim o serie de articole în cadrul cărora este prezentată întreaga dezbatere iscată în Guvern, de la luările de poziție a opozanților, până la apărarea legii de către susținători

De asemenea, *Foaia poporului*, vorbește despre căsătoria civilă din celelalte țări unde aceasta a fost introdusă, apreciind că a adus numai „stricăciune, mare, nespun de mare. A stricat moravurile, a zguduit temelia credinței și a bisericilor, a pustiit moralitatea și evlavia în popor. În acele țări, precizează articolul, „Poporul silit a se supune legii, s-a supus. S-a supus de silă ca de voie bună, și legii despre căsătoria civilă. Lipsa preotului a început a nu o mai simți așa de des (...) nu au trebuit să treacă zeci de ani, până ce moravurile bune au scăpătat în chip vădit; frica de Dumnezeu a scăzut, bisericile s’-u golit; cârcimele s-au umplut și azi în acele țări este o adevărată pustiire în cele ale credinței și temerii de Dumnezeu” (Foaia poporului, 1894, p. 82).

Aceeași atmosferă este redată și de revista *Familia*: „luni a început să se dezbată în Dietă proiectul de lege pentru introducerea căsătoriei civile obligatorie. Discuțiunea e vehementă și deputații care se duc la Cameră sunt întâmpinați pe stradă cu *eljenuri* sau huiduiți cu *abzuguri* după cum sprijinesc sau combat proiectul.” Același ziar face referire la modul în care urmează să decurgă votarea proiectului de lege „În Dietă legea va fi votată cu mare majoritate, dar în Casa Magnaților soarta ei este problematică. Deputații români, după informațiunea ziarelor maghiare vor vota astfel: Ioan Beleş, Virgil Bogdan, George Szerb și Gerard Weghseo pentru, Petru Mihali și Silviu Rezei contra” (Familia, 1894, p. 83).

S-a făcut auzită și vocea românilor în Dieta ungurească, după cum redă numărul din Martie al revistei *Familia*: „Au trecut mulți ani de când în Dieta Ungariei nu s-a mai auzit nici un glas de român. Acum, miercuri la discuțiunea asupra proiectului de lege pentru căsătoria civilă, a vorbit, după atâta tăcere, deputatul de la Făgăraș, dl. Dr. Nicolae Șerban. La aprecierea cuvântării sale nu ne putem extinde, constatăm numai că a combătut proiectul de lege și că a fost mult aplaudat de opoziție” (Familia, 1894, p. 119).

Treptat, s-au definitivat „taberele” care se manifestau pro sau contra proiectelor legilor politico-bisericești: pe de-o parte era falanga liberală, sprijinită de majoritatea politicianilor protestanți, precum și de clerul bisericilor protestante, chiar dacă nu toți erau de acord cu anumite prevederi. De asemenea, susținători ai legilor menționate erau și izraeliții, care obțineau prin legile menționate recunoașterea confesională și egala îndreptățire cu celelalte religii recepte din Ungaria. De cealaltă parte se afla, Biserica Catolică, cea mai afectată de aceste legi, dar și bisericile ortodoxe din imperiu, precum și cei care se opuneau recunoașterii confesionale a evreilor (Mârza, 2002, p. 68).

Guvernul unguresc, conștient fiind de ostilitatea cu care este privit proiectul de lege s-a folosit de toate mijloacele avute la îndemână, mergând până la manipularea populației cu scopul îndeplinirii obiectivului propus. Astfel, tot presă aflăm că la Budapesta, se va organiza o adunare cu scopul de a demonstra în favoarea căsătoriei civile: „Măine, Duminică 4 martie se va ține o marea adunare la Budapesta care este pusă la cale de guvernul unguresc și de plecatele lui slugi cu scopul de a demonstra în favoarea politicii bisericești. Mulțime de trenuri vor duce gratis pe demonstranți la tâmbălăul guvernului de mâine și după cum ni se comunică, slujbașii guvernului au cutreierat comunele din Ungaria până la Arad, să ducă țărani din toate naționalitățile la Pesta. Prin astfel de mijloace și apucături nedemne voiește ocârmuirea

ungurească să-și facă popularitate și să arate lumii că proiectele bisericești sunt pe placul populației țării” (Gazeta Transilvaniei, 1894, p. 2).

*Foaia poporului*, nr 1 din Ianuarie 1894, la rubrica „Cronică”, informează că, „căsătoria civilă și celelalte păgubitoare legi bisericești ce stăpânirea vrea să le aducă, au adus zile negre însăși stăpânirii...s-a pornit o adevărată destrămare a partidului ce sprijinea până aici stăpânirea, o mulțime de deputați fruntași au ieșit din acel partid (Foaia poporului, 1894, p.76).

Cu toată opoziția la adresa legislației matrimoniale totuși aceasta va fi în cele din urmă votată însă nu putem să nu remarcăm reacția de bucurie redată de articolele ziarelor, ori de câte ori aceasta întâmpina o problemă. Numărul din Aprilie al revistei *Familia* informa la rubrica *Ce e nou?* Că proiectul de lege pentru căsătoria civilă s-a votat în Dietă cu majoritatea de 175 de voturi. Dintre deputații români „domnul Silviu Rezei a votat contra, iar domnii George Szerb, Ioan Babeș, Virgil Bogdan, Iuliu Vinț și Petru Vuia pentru” (Familia, 1894, p. 191). Același periodic informa în numărul din Aprilie că proiectul de lege pentru introducerea căsătoriei civile votat și pe paragrafe s-a trimis la Casa Magnaților, care l-a transpus comisiei justițiară și apoi a început să-l discute. Iar din numărul din Mai aflăm că: ”În Casa Magnaților a început să dezbată luni proiectul de lege pentru introducerea căsătoriei civile iar dintre prelații români, care toți au fost de față și toți au votat contra, a vorbit Esc. Sa arhiepiscopul și mitropolitul Miron Romanul. Proiectul guvernului a fost respins cu majoritatea de 21 de voturi” (Familia, 1894, p. 215). Legea a intrat în vigoare din 1 octombrie 1895, simultan cu cea care trata religia copiilor născuți în căsătoriile mixte.

Reacția societății transilvănene a fost în general ostilă față de aceste proiecte de lege, după cum reiese din paginile cotidianelor, aceleași cotidiene redau și ostilitatea bisericii și poziția ei cu privire la legislația civilă, așa încât în urma lecturării presei s-ar părea că aceste proiecte de lege nu erau dorite de nimeni. Cu siguranță imaginea conturată de presă este una subiectivă, editorialistii fiind încă sub influența unei societăți patriarhale și puternic religioasă.

De asemenea, respingerea în prima fază a proiectului a fost primită cu entuziasm de români, după cum reiese din articolul redat în *Gazeta Transilvaniei*, numărul din Mai: „Joi 10 Mai s-a terminat în Camera Magnaților din Budapesta dezbaterile asupra proiectului de lege privitoare la introducerea căsătoriei civile. Proiectul a fost respins cu o majoritate de 21 de voturi. Mult este a mulțumii arhierilor noștri români de ambele confesiuni, care cu toții au grăbit a se înfățișa în Camera Magnaților, unde prin votul lor au contribuit la căderea proiectului. Ca recunoștință, Excelenței Sale Mitropolitului Miron Romanu i s-a făcut o frumoasă primire la gara din Sibiu, unde fu întâmpinat de un număr mare de români fruntași care-l petrecură până la reședință” (Gazeta Transilvaniei, 1894, p. 6).

În ceea ce privește modul de aplicare al acestor legi, bisericile au trebuit să se plieze la realitățile epocii și să recomande executarea lor, deoarece pedepsele prevăzute erau considerabile. Așadar, realitățile unei Transilvanii multietnice și pluri-confesionale au silit autoritățile celor două biserici românești să-și adapteze discursul la necesitățile locurilor, la interferențele etno-confesionale apărute în planul relațiilor cotidiene.

Biserica Ortodoxă Română a reacționat prin intermediul unei circulare a mitropolitului Miron Romanul prin care enunța modificările survenite în procedura privind la încheierea căsătoriilor. Noile legi erau desemnate a introduce noi abordări, care urmau să modifice întreaga societate: „sunt menite a reforma întreaga viață familială și socială” și, totodată, slăbeau legătura internă a bisericii, subminând morala societății (Bolovan et al., 2009, p. 432). Mitropolitul considera că ”în spatele acestui proiect stau cu totul alte scopuri și tendințe (...) căsătoria civilă neglijează sfîntenia bisericească, desconsideră autonomia și promovează demoralizarea în popor, care astfel lipsit de credință și de Dumnezeu nu se va mai pleca nici bisericii nici înaintea legilor lumești. Sinodul din Ardeal ține de o nenorocire introducerea căsătoriei civile și dacă s-ar introduce, atunci va folosi toate mijloacele ștergerea aceluia”(Gazeta Transilvaniei, 1894, p. 4).

De asemenea, prin vocea Congresului Național-Bisericesc, se statua și pe mai departe că valabilitatea unei căsătorii încheiate de credincioșii săi era determinată de ceremonia încheiată conform prescrișelor bisericii. Instrucțiunea mitropolitană recunoștea necesitatea de a respecta prescripțiile legale referitoare la desfacerea căsătoriei, accepta pronunțarea inițială a tribunalelor civile în această direcție, dar impunea prezentarea cu sentința civilă și în fața tribunalului ecleziastic, pentru ca și Biserica Ortodoxă Română să se poată pronunța (Brie, 2008, p. 94).

În ceea ce privește transpunerile în practică ale unora din măsurile prescrise de către Biserica Greco-Catolică Română ca urmare a intrării în vigoare a legilor „politico-bisericești”, menționăm că arhiepiscopul Victor Mihályi de Apșa a convocat la Blaj un sinod arhidiecezan. Participanții la sinod au trebuit să analizeze unele efecte ale prevederilor legilor civile, precum și modalitatea de sincronizare a normelor arhidiecezane cu poziția adoptată de întreg episcopatul catolic din Ungaria (Bolovan et al., 2009, p. 463).

Episcopatul catolic maghiar, beneficiind de acordul Sfântului Scaun, a inițiat o mișcare de combatere a acestor reforme, văzute ca având efecte nocive atât pentru biserică, cât și pentru credincioșii catolici. Opoziția acestora, anterioară intrării în vigoare a articolelor de lege XXXI, XXXII și XXXIII din anul 1894, a fost evidențiată printr-o serie de epistole pastorale adresate clerului și credincioșilor catolici. Cea mai importantă dintre acestea a fost publicată în 31 august-1 septembrie 1895, cu o lună înainte de promulgarea legilor mai sus pomenite, când era deja evident faptul că biserica nu se mai putea opune aplicării acestora. Rolul pastoralei era acela de a le prezenta credincioșilor catolici învățăturile bisericii cu privire la căsătorie, considerată o taină. Se afirma că noile legi civile nu determinau nici o modificare a dogmelor bisericești, deci căsătoria religioasă era singura recunoscută de biserică. „(...) se poate înțelege din ea că fiecare bun catolic este dator a se lupta contra căsătoriei civile, și clerul superior catolic și ține de dorința a lupta în contra acestei reforme, chiar și dacă ea ar deveni lege. (Bolovan, 1999, p. 465). Cu toate acestea, pastorală arată că, pentru a fi legitimă și în ochii autorităților civile, ea trebuia încheiată și în fața funcționarilor de stare civilă și înscrisă în matriculele de stat.

De asemenea, episcopatul catolic recomanda credincioșilor să se prezinte întâi în fața preotului și să îi comunice intenția lor de a se căsători și, după îndeplinirea formalităților prescrise de biserică (strigări, dispense), să efectueze ceremonia civilă.

Populația fidelă tradiției religioase reacționează la apelurile Bisericii, astfel *Gazeta Transilvaniei* reda sub titlul „Un nou fiasco al mamelucilor” faptul că la 25 februarie a fost convocată la Hațeg o adunare a alegătorilor din cercul Hațeg, cu scopul de a se pronunța în favoarea proiectelor de reformă politice-bisericești ale guvernului. Adunarea a fost convocată de câțiva jidano-maghiari din Hațeg: „cu bucurie aflăm că românii din acel cerc au știut să pună la regulă obraznica ceată a mamelucilor jidano-maghiari din Hațeg, al căror plan l-au zădărnicit cu desăvârșire. Pe când ei în număr de vreo 20, se adunară în Casina maghiară din Hațeg cu scopul ca să aducă concludu de aderență pentru politica guvernului...năvălesc asupra lor mulțime de alegători români, care în frunte cu preoți și alți fruntași de-ai lor veniră din mari depărtări la Hațeg anume pentru acest scop”. Era evident că maghiarii fuseseră luați prin surprindere, discuțiile numaidecât s-au terminat și adunarea s-a împrăștiat. „Românii hațegani se pot felicita de acest succes al lor” (*Gazeta Transilvaniei*, 1894, p. 2).

Reprezentanții Bisericii au recurs și la o altă formă de protest și anume, organizarea de adunări ale credincioșilor cu scopul de a se pronunța împotriva căsătoriei civile. O astfel de adunare este convocată la 17 martie 1894 la Alba Iulia, o adunare a ortodocșilor la care președintele conferinței Mateiu Nicola afirma: „(...) proiectele bisericești, cari devenind lege zguduie din temelii așezămintele noastre bisericești, atacă morala în poporul nostru”, fiind foarte clară poziția față de legea civilă, Nicola, cheamă la protest în cadrul unei adunări organizate, pe toți românii din comitatul Albei Inferioare, Hunedoara, Turda-Arieș și din

cercul Sebeșului, „să se prezinte în număr important la aceia adunare, ca astfel glasul poporului să pătrundă până la factorii dătători de ton, și de se poate încă în ora a 11-a să se împiedice această calamitate pentru popoarele autohtone, cari nu consimt, nu vor consimții cu acele legi” (Foaia poporului, 1894, p. 156).

Căsătoria civilă obligatoare este pusă în plan de lege și se discută în Dieta țării. O pornire vedem prin toate straturile societății și la toate confesiunile. „Marea biserică romano-catolică cu episcopatul în frunte a protestat solemn în contra celui plan de lege în adunarea din Budapesta (...) Noi Românii încă avem dreptul cât și datorita a ne rosti păreri (...) De aceea apelăm la fiii bisericii românești gr.-or. și gr.-cat. și-i invităm la adunarea, oare în scopul acesta o convocăm pe Joi după Sfintele Paști în sala hotelului Crucea-Albă în Arad, la orele 11 a. m.” (Foaia poporului, 1894, p. 157) Astfel la 3 Mai 1894 s-a organizat adunarea de protest la Arad, adunare bisericească la care au participat 10000 de persoane, din cauza mării aglomerațiuni mari de popor, adunarea a trebuit să se țină sub cerul liber, în piața mare, la care în urma cuvântărilor s-a votat o *Rezoluțiune* care prevedea la punctul II ”proiectele de legi bisericești ale guvernului, în special proiectul pentru căsătoria civilă nu numai atacă și vatămă principiile dogmele bisericii care înaintea statului trebuie să aibă valoare de venerațiune pentru moralitatea lor, dar ele se împotrivesc principiului justiției, violentând libertatea conștiinței și desființând autonomia bisericii naționale (...) din aceste motive adunarea protestează (...) și roagă pe preasfinții mitropoliți și episcopi ai bisericii românești, ca cu toată energia să lucre în contra lor, până și la treptele tronului” (Gazeta Transilvaniei, 1894, p. 2).

Articolul *Să ne adunăm și să protestăm din nou!* cheamă la protest deoarece „primejdia de a se introduce căsătoria civilă obligată a fost văzută de poporul român și de bisericile lui (...) Cinci-zeci de atari adunări s-au ținut numai de români și din toate s-a îndreptat la adresa celor de la cârma țării: Nu ne trebuie! Nu simțim lipsa noii legi! În laturi cu ea! Așa au făcut și slovacii, așa au făcut și sârbii, așa au făcut toți oamenii de bine, toți creștinii adevărați”(Foaia poporului, 1894, p. 161).

Din simpla enumerare a chestiunilor care intrau în sfera de normare a statului, se poate constata că puterea laică se implică profund într-o serie de aspecte ale vieții cuplului. Autoritatea bisericilor în acest domeniu nu a fost contestată de către stat decât începând cu a doua jumătate a secolului al XIX-lea. Intervenția statului a fost generată de dorința de a pune capăt unor chestiuni care generau diferende interconfesionale, în special cele care priveau căsătoriile mixte confesional.

Imaginea legislației laice și ecleziastice referitoare la familie în general, și la matrimoniu în special, este una foarte complexă. Din dorința de a-și menține controlul Biserica a reușit, cel puțin până la un moment dat, să impună statului, în privința dreptului familial, propriile percepțe și norme legislative (Brie, 2008, p. 84).

Privind evolutiv aceste acte legislative nu putem să nu observăm modul în care statul a reușit să-și impună autoritatea în domeniul matrimonial. Biserica a fost nevoită să accepte competența sporită a statului prin introducerea actelor civile. Prin aceste legi nu a fost interzis, este drept, Bisericii să asiste și chiar să reglementeze, potrivit propriilor canoane, fiecare moment din viața unei familii. Biserica a pierdut însă caracterul oficial al actelor emise de către cler. Noua percepție evidențiază obligativitatea validării de către autoritățile laice, iar în paralel, și de o manieră facultativă, o familie putea cere validarea de către Biserică a actelor cu caracter matrimonial (Brie, 2009, p. 234). În 1894, prin articolele de lege, în mod forțat, „spațiul” bisericii s-a micșorat, autoritatea sa trecând printr-un moment de cumpănă (Pădurean, 2006, p. 159).

Pentru stat și pentru populație, actele bisericești își păstrau valoarea lor confesională, fără a putea condiționa viața publică și social-laică a indivizilor. Pe de altă parte, Biserica putea condiționa asistența religioasă de recunoașterea propriilor acte matrimoniale



Deși registrele parohiale nu au fost interzise, ele au devenit acte de uz intern pentru confesiunea respectivă. În mod oficial, funcționarii statului trebuiau să-i îndrume pe cei căsătoriți civil și la o căsătorie religioasă, în practică, însă, acest fapt nu s-a întâmplat și din motivul că mulți notari erau de altă confesiune decât cea ortodoxă (Pădurean, 2006, p. 159).

Presa a fost subiectivă, informațiile oferite s-au dovedit a fi departe de obiectivismul pretins de cititor. Întâlnim opoziția Bisericii și opiniile ei cu privire la acest proiect și nu o prezentare dintr-o poziție neutră. S-a constatat o bucuria de fiecare dată când această lege întâmpina un obstacol. Chiar și în expunerea dezbaterilor legii în cadrul instituțiilor politice, articolele au prezentat mai degrabă punctul de vedere al opozanților, rezultând o imagine din care reiese că acest proiect nu a fost dorit de nimeni, nu a avut susținători. Această situație poate fi explicată prin faptul că jurnalele care au luat această poziție au fost fie afiliate, fie susținătoare ale unei Mitropolii românești. Este de înțeles și reacția credincioșilor într-o societate încă patriarhală și puternic religioasă.

Elaborarea unor concluzii pertinente privind impactul imediat, dar și cel pe termen lung al legislației din anii 1894-1895 asupra societății, precum și influența acestor legi asupra mentalului individual și de grup, având drept punct de reper cazul concret al românilor din Transilvania, rămâne o chestiune deschisă unor investigații ulterioare.

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# FORMAREA COALIȚIEI DE GUVERNARE PNL-PSD-UDMR 2021

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**Abstract:** *This article describes the construction of the governmental coalition PNL-PSD-UDMR in the second part of the year 2021 in Romania. We will present the situation in the country, the situation in the political parties and the possible possibilities of parliamentarian's coalitions. In this article you will also find the vision of the president in having a govern in Romania and the nomination of the candidates for the dignity of prime minister.*

**Cuvinte cheie:** pandemie, factori politici, factori medicali, mass-media, guvern, alianțe politice, președinte, putere, opoziție, partide politice.

## Introducere:

”România și Pandemia” poate fi un slogan general valabil pentru situația anilor 2020 și 2021 din țara noastră. Pandemia a adus și alegeri generale în România urmate de formarea unui guvern de coaliție format din: PNL-USR-UDMR și minorități în data de 23. 12. 2020. Acest guvern a fost demis printr-o moțiune de cenzura în data de 05. 10. 2021 cu 281 de voturi pentru (Digi24, 2021). Pentru a înțelege mai bine situația politică din România ultimilor 2 ani este necesar să facem o analiză a întregii situații prin care a trecut societatea noastră în cei aproape doi ani de pandemie.

*Declarațiile politicianilor* – cea mai mare greșală a politicianilor noștri a fost aceea că, prin declarațiile lor în loc să sedimenteze un sentiment de încredere la nivel de micro și macroclimat, au făcut exact invers: la început au fost declarații ale președintelui care minimizau virusul comparându-l cu o simplă gripă (probabil pentru a nu crea panică în rândul populației) (Mediafax, 2021), ulterior acesta schimbându-și discursul radical, punând accent pe evenimentele tragice provocate de acest virus. Prin aceasta atitudine și mai ales, ulterior prin declararea stării de urgență cu limitarea posibilității de deplasare din casa ca urmare a unui lock down destul de abrupt, au făcut să scadă încrederea populației în puterea politicianului de a rezolva această problemă. Din punctul nostru de vedere, declarațiile miniștrilor educației (actuali și foști) în această perioadă nu au fost dintre cele mai fericite. Era evident că se dorea începerea cursurilor față în față, pentru o educație de mai bună calitate, dar trebuia să se țină cont mai mult de previziunile ratelor de infectare. A deschide școli ca pe urmă la un interval de timp destul de scurt să le închizi, a crescut gradul de nesiguranță în rândul elevilor, studenților și al părinților.

*Declarațiile medicilor:* între medici sau distins doua nume doctorul Rafila și doctorul Străinu Cercel. La început declarațiile lor corecte au indus teama în populație, mai mult decât o explicare a fenomenului. Lipsa de soluții de la începutul pandemiei, criza din sistemul sanitar românesc pe care miniștrii sănătății Tătaru, Voiculescu și Mihăilă nu o puteau evita, a dus la adâncirea și mai mare a neîncrederii. Deși ulterior au apărut soluții și chiar și vaccinuri anticovid promovate corect și de doctorul Raed Arafat și ulterior de doctorul Valeriu Gheorghiuță, aceștia nu au reușit, din punctul nostru de vedere, să reducă neîncrederea.

*Mass-Media:* promovarea în mass-media a multor știri despre numărul mare de infectări și decese din cauza Covid-19 zi de zi și lună de lună, a accentuat și mai mult teama populației și anumite rezerve față de vaccinare. De asemenea, știrile despre efectele secundare ale

diferitelor tipuri de vaccinuri au acoperit știrile despre efectele benefic ale respectivelor vaccinuri și astfel s-a adâncit teama și neîncrederea.

*Factorul religios:* într-un popor credincios și credul declarațiile preotului sunt foarte importante. De departe cele mai multe știri în această perioadă au fost cele despre IPS Teodosie, care oferea explicații prin intermediul cărora enoriașii erau mai degrabă îndepărtați de la vaccinare (Digi24, 2021). Unii ierarhi, de exemplu Patriarhul Daniel a intervenit târziu în sprijinul vaccinării, acesta declarând că s-a vaccinat doar în noiembrie 2021. Din punctul nostru de vedere, toate declarațiile nonștiințifice ale unor ierarhi precum și reținerea capilor bisericii ortodoxe (majoritare în România) de a sprijini clar vaccinarea, au contribuit la adâncirea haosului și a neîncrederii din mentalul individual și cel colectiv.

Alături de acești factori mai înainte menționați, o serie de mitinguri și reacții ale unor vectori de imagine din viața politică, publică și culturală a societății împotriva purtării măștii de protecție au adâncit reacțiile antitot din partea unor segmente ale populației. Aceasta a fost atmosfera în care au avut loc evenimentele politice ale anilor 2020 și 2021 pe care le vom analiza în continuare.

Pentru a ne fi mai clară formarea coaliției de guvernare PNL-PSD-UDMR, considerăm că mai important de analizat, din punct de vedere politic, e anul 2021 decât cel anterior. După cum am afirmat pe parcursul acestui articol, în perioada decembrie 2020 – octombrie 2021 activ a fost guvernul Cîțu. Florin Cîțu a ajuns prim ministru al României susținut de o coaliție formată din PNL-USR-PLUS-UDMR și minorități. Aceste partide au reprezentat puterea, iar PSD și partidul AUR au reprezentat opoziția. În această perioadă politicieni mai vocali au fost: Diana Șoșoacă, George Simion și Claudiu Târziu de la AUR și președintele PSD Marcel Ciolacu. Alte două nume care s-au făcut auzite în această perioadă au fost copreședinții USR-PLUS Dan Barna și Dacian Cioloș. Anul 2021 a fost unul al convulsiilor paradoxale. De ce paradoxale? În mod logic, pe fondul unei crize economice creată în mare parte din cauza pandemiei de Covid-19, ne-am fi așteptat la convulsii sociale, dar nu a fost așa. Ceea ce populația a înțeles politicienii nu au înțeles, iar lupta de putere din interiorul partidelor, precum și declarațiile publice ale unor lideri nu au făcut altceva decât să adâncească neîncrederea oamenilor în factorul politic, în instituțiile statului șubreazănd astfel statul de drept. Lupta de putere intra partid a luat locul (în mintea oamenilor simpli și mulți) luptei contra pandemiei. În această perioadă s-au cristalizat două tipuri de entități politice:

1. Echilibrate intra partid : PSD, AUR, UDMR
2. Dezechilibrate intra partid: PNL, USR-PLUS

Cum era și firesc de altfel, partidele din opoziție echilibrate intra partid au crescut în preferințele electoratului în toate sondajele de opinie, iar partidele dezechilibrate de lupta de putere pentru șefia acestora au scăzut destul de mult în preferințele electoratului. În noiembrie 2021 un sondaj Avangard acredita PSD cu 40%, PNL cu 17%, AUR cu 15% și USR cu 11% din preferințele populației (Digi 24, 2021). Cea mai tragică dintre concluziile acestui sondaj de opinie a fost reprezentată de faptul că peste 80% dintre români au considerat că țara se îndreaptă într-o direcție greșită.

## **Metodologie**

În elaborarea acestui material demersul nostru științific va fi unul analitico-descriptiv, bazându-ne pe o analiză de conținut ca și metodă de cercetare. În cadrul acestui demers, au fost analizate mai multe site-uri, emisiuni de televiziune precum și declarații publice ale factorilor implicați.

## **Analiza aspectelor care au condus la formarea guvernului Ciucă**

### *Situația partidelor de dinaintea coaliției de guvernare PNL-PSD-UDMR*

#### **PNL**

În cea de a doua parte a anului 2021 s-au cristalizat clar două grupări în PNL (PNL-Partidul National Liberal, n.d.) în jurul celor doi lider și ulterior și candidați pentru șefia partidului, este vorba despre Florin Cîțu primul ministru al României și Ludovic Orban președintele în funcție (până în septembrie 2021) al PNL. În data de 25 septembrie 2021 Florin Cîțu câștigă șefia PNL cu un scor de 2878 voturi față de Ludovic Orban care a obținut 1898 voturi Digi24, 2021a). Prin urmare, cu un avans de aproape 1000 de voturi gruparea Cîțu își impune candidatul dorind și în acest fel să continue guvernarea. Din păcate, discursurile celor doi candidați la șefia PNL s-a degradat în lunile de dinaintea congresului atât de mult încât, era previzibil faptul că cei doi (indiferent care ar fi câștigat) nu s-ar mai fi putut reconcilia după congres. Această previziune s-a și întâmplat, Ludovic Orban părăsind partidul. Indiferent de motivele invocate, este clar că Orban a părăsit PNL pentru că a pierdut alegerile și șefia partidului. Problema PNL a fost că Orban nu a plecat singur, el fiind însoțit de mai mulți parlamentari PNL (fie loiali lui fie care s-au aflat în disonanță cu noua conducere a PNL). Un alt aspect tragic/comic, care a dus și la deteriorarea încrederii populației în președintele Iohannis a fost următorul: atacarea prin discurs a președintelui Klaus Iohannis de Ludovic Orban. Am afirmat că a fost un aspect tragic/comic pentru că în campaniile prezidențiale Orban a fost unul dintre cei mai loiali susținători ai lui Iohannis. Orban simțind că nu este susținut de Iohannis la șefia PNL și, de asemenea, simțind că este susținut Florin Cîțu a început să atace (Digi24, 2021, Sept. 14). Atacurile lui Orban la adresa președintelui Iohannis s-au întezit după pierderea de către acesta a șefiei PNL, exemplul cel mai elocvent în acest sens a fost cel din 24.11.2021 când Orban a cerut demisia președintelui (Ghiorge, 2022). Toate aceste frământări din interiorul PNL au contribuit substanțial la decredibilizarea liderilor săi și la scăderea în preferințele electoratului a acestui partid politic până la un scor de 17% în luna noiembrie 2021.

#### **USR-PLUS**

Și aceasta formațiune/alianță politică a avut alegeri interne în cea de a doua jumătate a anului 2021. Protagonisti au fost cei doi vicepreședinți Dan Barna și Dacian Cioloș. Lupta din interiorul acestei coaliții a fost mult mai soft decât la PNL. Atacuri directe dintre cei doi candidați nu au fost, dar au fost atacuri între membri care făceau parte din grupările lor. Aceste alegeri au reprezentat și ele un dezechilibru al miniștrilor USR-PLUS și au contribuit și ele la creșterea neîncrederii în clasa politică. În urma alegerilor, în cel de-al doilea tur de scrutin a câștigat Dacian Cioloș cu 50,09% la o diferență de 695 de voturi față de Dan Barna (Mihăescu, 2021). Pentru mulți acest rezultat a fost o surpriză, chiar și pentru cei doi contracandidați. Ulterior acestor alegeri membrii USR-Plus au decis ca această formațiune politică să se numească USR (Digi 24, 2021, Oct 3). În sondajele de opinie USR era cotate cu scor de 11% în preferințele electoratului în luna noiembrie 2021.

#### **PSD**

Partidul Social Democrat fiind în opoziție în 2021 a crescut constant în sondaje în această perioadă datorită a trei parametri principali:

1. Greșelile guvernării contabilizate în special de PNL.
2. Constanței partidului – nu au avut alegeri sau dezechilibre intra partid.
3. Reacțiilor publice prompte și în general bune ale principalilor vectori de imagine ai PSD în frunte cu președintele partidului Marcel Ciolacu.

După cum am afirmat în paginile acestui articol, PSD a crescut constant în preferințele electoratului ajungând în luna noiembrie 2021 la un scor în sondaje de 40% în preferințele electoratului.

## **AUR**

Partidul AUR e o formațiune politică apărută pe scena politicului românesc ca urmarea umplerii a unui gol de dorințe naționale ale electoratului, gol pe care celelalte partide politice nu l-au putut umple de conținut și mesaj. Și acest partid a crescut în baza acelorași parametri care au favorizat și creșterea PSD în preferințele electoratului, ajungând în sondajele lunii noiembrie 2021 la un scor de 15%. Dintre vectorii principali de imagine ai acestei formațiuni politice s-au detașat cei doi copreședinți George Simion și Claudiu Târziu.

## **UDMR**

UDMR este o formațiune politică foarte constantă care și-a menținut acest echilibru și în 2021, nefiind erodată de guvernare. Vectorii principali de imagine ai acestei formațiuni politice au fost miniștri săi precum și președintele UDMR Kelemen Hunor. În general scorul electoral al UDMR a fost întotdeauna constant cuprins între 5 și 6,5%.

### *Premisele coagulării unei colacii de guvernare PNL-PSD 2021*

Pe fondul acestor dezechilibre interne ale partidelor din arcul guvernamental, la care s-au adăugat dezechilibre în comunicarea factorilor politici decizionali referitoare la pandemie și vaccinare precum și pe fondul apariției unor dezvoltări legate de trecutul primului ministru Cîțu (chiar dacă acesta și-a recunoscut respectivele derapaje din tinerețe) (Digi24, 2021, August 14) și, de asemenea, pe fondul creșterii tensiunilor și a neînțelegerilor dintre PNL și partenerii de guvernare din USR-PLUS, a apărut din ce în ce mai fervent ideea demiterii guvernului condus de acesta în rândul partidelor de opoziție. Acest proces s-a întâmplat în data de 5 octombrie 2021, când guvernul Cîțu a căzut printr-o moțiune de cenzura votată și de USR-PLUS (Oprea, 2021).

Cum era de așteptat, președintele Iohannis, deși nu a spus-o explicit, dorea o continuare la guvernare a PNL, dar PNL nu mai putea avea o colaborare cu USR-PLUS a cărui parlamentari votaseră căderea guvernului Cîțu (premier PNL), dar și împotriva propriilor miniștrii, pentru că USR avea în guvern proprii săi miniștri. În acel moment, președintele PSD se declara ferm pentru organizarea alegerilor anticipate, idee agreată și de AUR. Din declarațiile publice de la acel moment, s-a conturat ideea că singura formațiune politică prezentă la negocierile de la Cotroceni care i-a propus președintelui Iohannis un candidat la demnitatea de prim ministru al României a fost USR-PLUS, care l-a propus pe Dacian Cioloș pentru această poziție. Au urmat o serie întreagă de întâlniri între reprezentanții partidelor parlamentare care nu au ajuns la un consens și nu au reușit să se pună de acord asupra unui program de guvernare avându-l ca premier pe Dacian Cioloș. Acesta din urmă, chiar dacă a știut care e situația, a preferat să meargă mai departe în parlament, mizând în planul imaginii pe ideea responsabilității față de nevoile țării. În sesiunea parlamentară din 20 octombrie 2021 la votul de investitură guvernul Cioloș a fost respins, 188 de parlamentari votând împotriva investirii și doar 88 de parlamentari votând pentru investire (Kiss, 2021).

În situația nou creată au urmat noi negocieri dintre președintele Klaus Iohannis și partidele parlamentare. Calculul aritmetic (și după plecarea lui Ludovic Orban cu mai mulți parlamentari din PNL) arată că nu există nicio altă posibilitate de a face un nou guvern decât dacă s-ar forma o coaliție imposibil de gândit în urma cu câteva luni dintre PSD și PNL. Viața politică românească s-a găsit din nou într-o situație tragic/comică pentru că cei care s-au atacat destul de dur în parlament în anul 2021 și prin tot felul de declarații publice, erau puși în următoarea situație: fie să colaboreze și să formeze o majoritate parlamentară care să sprijine

un guvern PSD-PNL, fie să meargă la anticipate. Interesant de remarcat mai este și faptul că partidul AUR era exclus de toate celelalte formațiuni politice de la colaborare, dar nici cei de la AUR nu doreau să intre într-o coaliție politică de guvernare cu niciun partid parlamentar. În perioada care a urmat, în urma mai multor întâlniri, PSD prin poziția președintelui Marcel Ciolacu a trecut de la opțiunea pentru alegeri anticipate la opțiunea intrării la guvernare, într-o primă fază mai mult cu un guvern de specialiști, care ar fi urmat să fie sprijinit politic. Ulterior cei de la PSD au agreeat și ideea unui guvern de coaliție PSD-PNL. Cei de la PNL la fel, după multe consultări interne în partid, au ajuns la concluzia că e mai bine să facă o coaliție de guvernare cu PSD decât să meargă la alegeri anticipate. Totuși cei de la PNL au insistat ca ei să aibă premierul. Din punctul nostru de vedere, această idee a fost agreeată și de președintele Iohannis. După alte runde de consultări cele două partide au agreeat o formulă de alternanță în această funcție a unui prim ministru până la viitoarele alegeri și anume: un an și jumătate să fie un premier de la un partid și celălalt an și jumătate de la celălalt partid. S-a agreeat, de asemenea, ca primul partid care să dea primul ministru să fie PNL. După alte runde de discuții și negocieri la care au fost invitați și cei de la UDMR s-a agreeat o formulă de guvernare PNL-PSD-UDMR cu un premier de la PNL în persoana generalului în retragere Nicolae Ciucă (membru PNL) și agreeat și de președintele Iohannis. Astfel că, în ședința comună a celor două camere parlamentare din 25 noiembrie 2021 guvernul Ciucă a fost investit cu 318 voturi pentru această investire (Eremia, 2022). Acestea au fost unele dintre cele mai importante momente care au stat la baza formării coaliției de guvernare PNL-PSD-UDMR și a desemnării ca premier a lui Nicolae Ciucă.

## Concluzii

”Never say never” – este prima concluzie care decurge în mod firesc din tot acest articol precum și din analiza vieții politice românești din ultimii 30 de ani. Frământările din interiorul partidelor și dezechilibrele de la guvernare au condus la ruperea coaliției PNL-USRP-LUS-UDMR. Activitatea și declarațiile publice ale miniștrilor sănătății și educației în această perioadă pandemică au contribuit la dezechilibrele politice. De asemenea, acești miniștri nu au reușit crearea unui consens popular în ceea ce privește vaccinarea. Mass-media a avut și ea un rol în formarea unei noi majorități parlamentare (octombrie/noiembrie 2021) prin dezvăluirile făcute. Președintele Iohannis nu a reușit o reechilibrare a coaliției PNL-USRP-PLUS-UDMR și acesta a reprezentat un factor al coagulării coaliției PNL-PSD-UDMR.

Pandemia și premisele clare ale unei crize economice pentru anul 2022, mai ales în ceea ce privește zona energetică, au condus la nevoia unei stabilități parlamentare și a unei coaliții de guvernare puternice, în măsură să susțină măsurile unui nou guvern.

Poate cea mai importantă consecință a anului 2021, pusă în evidență de toate sondajele de opinie și care avut efecte negative pentru întreaga societate, a reprezentat-o scăderea încrederii populației în clasa politică și în instituții, încredere care oricum nu era foarte mare.

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# OCCUPYING A VACANT ARCHPRIESTSHIP IN GREEK CATHOLIC DIOCESE OF CLUJ-GHERLA

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**Abstract:** *In the twentieth century, the Church continued to be a prominent institution in Romania, especially in rural areas. Regarding the case of Transylvania, most Romanians were parishioners of either the Romanian Church United with Rome or the Orthodox Church, both being officially recognized as state churches. Within each diocese, the bishop, in order to ease the task of administering the diocese, divides the territory into several districts which he offers to the archpriests to administer. Starting from this social reality, the purpose of this research is to illustrate the way in which a vacant archpriestship was occupied, as a result of the former archpriest's retirement. For a better understanding of the implications of choosing a new archpriest in a vacant district, I chose a case study, namely: the case of the Surduc archpriestship in 1940. The archpriest of Buciumi, Gavrilă Deac wanted to be transferred from his own district to Surduc, so this paper aims to present both the stages of filling of the vacancy and the consequences of this transfer approved by the bishop Iuliu Hossu.*

**Key words:** Greek-Catholic Church, Diocese of Cluj-Gherla, archpriest, parishioners

## Introduction

According to the custom established for many years, when a parish on the territory of the Greek Catholic Diocese of Cluj-Gherla became vacant, this aspect was reported in the newspaper of the diocese, „Curierul Creştin”, announcing that the vacancy is up for competition. Surduc parish was no exception to this rule, the competition for its occupation being published in the first half of February 1940 (Curierul Creştin, nr. 3, 1940, p. 22), following the retirement of archpriest Ambroziu Plaian. The election of a new archpriest became necessary in the early spring of 1940.

Therefore, the purpose of this paper is to present how a vacant archpriestship becomes occupied. To achieve this goal I chose a case study, namely the transfer of Archpriest Gavrilă Deac, a choice I made primarily because it is a well-documented case, information about this event can be found both in the archives Of the Greek Catholic Diocese of Cluj-Gherla, as well as in those of the Greek Catholic Archpriestships of Surduc and Buciumi, and secondly, the choice offers the opportunity to highlight both the occupied archpriestship and the transfer of an archpriest from a district to another, as well as the consequences of this transfer: the reaction of the parishioners from Buciumi, the reaction of those from Surduc, Deac's motivation, as well as the issue of succession in the Buciumi district. In order to achieve the purpose of the research, I chose the following objectives: the first aims to present the main aspects that make a priest eligible to be appointed archpriest: what documents are required, as well as what professional training he must have.

The second objective aims to illustrate the chronological stages of the transfer: the application, the appointment, the takeover of the new district, as well as the issue of succession. And finally, the third objective focuses on the reactions that occur in the territory (for example, the dissatisfaction of some believers), and how the diocese manages to deal with all these aspects.

## **Theoretical framework**

Before starting the actual presentation, it is necessary to highlight the importance of the archpriestship institution in a diocese. This institution occupies in the church hierarchy an intermediate place placed between the diocese and the parish (Rigman, 2012, pp. 49-50). According to the provisions established within the First Provincial Council of the Greek-Catholic Church Province of Alba-Iulia and Făgăraș, the bishop, in order to ease the task of administering the diocese, divides the territory into several districts that he offers for pastorate to the archpriests (Conciliul Provincial Prim , 1886, p. 43).

Thus, the role of the archpriests in the administration of church matters in the territory is a very important one, they being practically vested by the bishop with jurisdictional power over both the priests from the districts and the parishioners. At the same time, it is important to point out that an educational standard was outlined for those who wanted to be appointed archpriests, so those with studies in theological sciences and / or canon law were preferred (Rigman, 2012, pp. 49-50). With regard to situations in which an archpriestship becomes vacant, the bishop appoints either another archpriest or an interim archpriest administrator who administers the district until the appointment of a new archpriest, or he may be appointed as archpriest, if he proves his dexterity and zeal in the period in which he administers the institution (Conciliul Provincial Prim , 1886, p. 49). The appointment is made during a consistory meeting, the bishop consulting with the six clerics which form the Cathedral Chapter, and which represent "the aids located in the city of residence of the diocese" (Bojor, 1937, p. 18). Given the fact that through correspondence with the archpriests the bishop was informed about the situation of the parishes, especially in areas where the bishop managed to reach very rarely in the canonical visits he made, for a good administration of the diocese, the bishop had to be careful who he chose in various administrative positions (Sularea, 2008, pg. 11-13), including that of archpriest, requiring a competent person.

As previously stated, the contest for Surduc parish was published in the diocesan newspaper in February, and those who wished to submit their files had to do so by March 10th, 1940. The file was to contain 4 items: The Absolute (this document provided details both of a priest's studies and of his work after the studies were completed), Certificate of service from the archpriest's office to which the priest belongs, Extract from the school protocol regarding the catechesis of students in the previous school year (in the case study considered it is the year 1938-1939), to show that there was an adequate catechesis of the students, as well as an Extract from the protocol of the sermons of one year, recorded until the date of sending the file (Curierul Creștin, nr. 3, 1940, p. 22). Without these four documents, the file was considered incomplete, and was obviously not considered in the consistory meeting. Also, the two protocols had to be endorsed by the archpriest, an aspect that reveals once again the importance of the archpriest's institution within the diocese.

Shortly after the publication of the announcement in the "Curierul Creștin", the first file sent belongs to Gheorghe Pop, parish priest of Brâglez, Surduc district. In his letter, addressed to the bishop, Gheorghe Pop points out that due to the retirement of Ambroziu Plaian, the archpriest of Surduc, he wants to be his successor (Document 5099, 1940, p. 12). According to the file he sent, Gheorghe Pop had completed his higher education, and regarding the motivation of his desire to become archpriest, he highlighted his 30 years as a priest in Brâglez, during which time he had an exemplary activity, without disturbing incidents, aspect that is also confirmed by the Certificate received from Ambroziu Plaian (Document 5099, 1940, p. 1).

Another file for obtaining the office was sent to the bishop on March 5th, in this case being the file of Gavrilă Deac, archpriest of Buciumi district. What made a distinct note in this case was the motivation of Gavrilă Deac. He spoke of the fact that "the mission of reassuring

the parish and the archpriestship of Buciumi, as much as possible in the given circumstances, we fulfilled" (Document 4569, 1940, p. 1).

Continuing his motivation, the archpriest reports in the letter that he managed to restore the prestige of the priest in the parish, and that he solved a series of problems with the tables with the monetary situation in many parishes from the archpriestship. He also pointed out that when he was named archpriest, in 1938, the Orthodox church in Buciumi had a prominent position, being supported by the county organization, but that situation changed, and there were many transitions of believers from Orthodoxy to the Greek-catholic confession. However, despite these successes, Gavrilă Deac claimed that he can no longer stay in Buciumi due to malicious intrigues, the insults that are constantly brought to him by some people, so that all his activity ends up calling it tiring and even destructive, which is why he wanted to be relocated to another district. At the end of the letter he points out that he had done what was necessary to strengthen a link between the villages of the archdiocese, so that his successor will have an easier way to manage them (Document 4569, 1940), compared to the difficulties he encountered in 1938.

Analyzing the requests of the two (Gheorghe Pop and Gavrilă Deac) there is a big difference related to the motivation for which they wanted to be appointed. Gheorghe Pop had been a priest in that district for 30 years, he received the recommendation from the retired archpriest, Ambroziu Plaian, so for him it is a somewhat natural professional ascent. It is also worth mentioning that on March 25th, when Ambroziu Plaian sent a letter to all the priests from the Surduc district informing them that he was retiring and thanked them for all the years they worked together, on the back of the document it is stated that Bishop Iuliu Hossu approved Gheorghe Pop to temporarily administer the Surduc archpriestship (Document 35, p. 1).

For Gavrilă Deac, however, the situation was different. Two years before applying to be appointed archpriest in Surduc, he had been appointed archpriest in Buciumi, where he found a difficult situation, especially numerous problems related to monetary registers, as well as an ongoing trial of his predecessor, Cornel Oțiel, and the priest from Bogdana, both unable to justify the lack of the amount of 51,732 lei from the church funds (Document 82, pg. 280-282). Although he managed to solve a series of problems that he found when he came to Buciumi, Gavrilă Deac stated that he wants to be transferred to Surduc because he needs to get rid of the intrigues and mischievous comments that he constantly has to support from people of Buciumi (does not nominate the people in question).

What I think is relevant to mention in this context is the financial side. In many cases where it was desired to fill a vacant position (not only in the case of archpriests, but also of priests, clerics, religion teachers, etc.) the material part was also highlighted, in some cases it was the main reason, thereby the one who wanted an appointment or a transfer often invoked the need for a more substantial income for personal or family support. In the case of Gavrilă Deac, such a thing was not discussed, moreover, he wanted to be relocated to a district where the income was lower: in the archpriestship of Buciumi he received 6612 lei (Document 91, p. 130), while in Surduc he had an income of 5,221 lei (Document 21, p. 54). In addition to this comparison regarding the remuneration, it is also useful one regarding the number of parishes that each of the two archdioceses had. Surduc district Surduc had 24 parishes, and Buciumi district 21 parishes. Comparing the villages, in Buciumi, in 1940, 426 families (1721 parishioners) were recorded, while in Surduc (next to the branch in Solona), were 475 families (1547 parishioners), thus it can be seen that there are no big differences between the two archpriestships (Document 2399, 1940, pp. 1-6).

The decision made by the bishop was announced two months later, and, like the announcement of vacancies, the appointments also appeared in the diocesan newspaper. Thus, in number 9 of "Curierul Creștin", it is recorded that in the consistory meeting held in May 9th 1940, Gavrilă Deac, parish priest and archpriest in Buciumi, was appointed, upon request, as

the new archpriest in Surduc. Also, in this issue of the newspaper was published the competition for the position of archpriest of Buciumi, archpriestship that became vacant as a result of the approval of the transfer of Gavrilă Deac. Files could be submitted until July 10th (Curierul Creștin, nr. 9, 1940, pp. 73-75).

The appointment of Gavrilă Deac in Surduc had certain consequences in the Buciumi district, and in the following they will be highlighted. In order to understand the implications of choosing a new archpriest in the Buciumi archpriestship, one must consider the specifics of the district, and the fact that, by 1938, it had faced many problems (mentioned above), so the choice of a successor it was not an easy task, it was necessary a person that bishop Iuliu Hossu could count on to continue the work started by Gavrilă Deac.

After receiving the news that he had been appointed archpriest in Surduc, Deac wrote to the bishop of Cluj-Gherla at the end of May, showing his gratitude; but the letter still had another purpose: it recommended Ioachim Maxim, parish priest in Agrij, as interim administrator of Buciumi parish, and Emil Petran, priest from Almaș, was recommended for the position of archpriest of Buciumi district „considering the used tradition” (Document 4569, 1940, p. 2). This wording reveals that, although the bishop was the one who decided who is appointed as archpriest, there was a tradition that the one who retired, or was transferred elsewhere, would recommend someone to succeed him.

Even though he did not yet have a successor, and he continued to administrate the Buciumi archpriestship, Gavrilă Deac had to go to Surduc to take over that archpriestship. Ștefan Botha, the archpriest of Ileanda district, had been commissioned by Iuliu Hossu to take charge of putting Deac into office in his new residence, an event that took place on June 9th.

Ștefan Botha pointed out in a letter sent to the bishop that when he arrived at the church in Surduc with Gavrilă Deac, most of the laity greeted him properly, and yet, “a small crowd of dissatisfied people tried to produce discordant note” (Document 4569, 1940, p. 12). Though, that group was small; 5-6 people who threatened to change their confession and become Orthodox if Deac were to be their archpriest, they wanted someone from their district, most likely (even if the document does not indicate this) Gheorghe Pop was their choice, the one whom even the former archpriest would have wanted as his successor. However, the tense state did not degenerate, Ștefan Botha urging everyone to enter the church, mentioning that after the end of the service, they were no longer dissatisfied (Document 4569, 1940, p. 12).

After the service, the church assets and the official archives were handed over, Gavrilă Deac taking them over, at the same time taking the commitment to correct some situations in which the accounts had not been kept rigorously, as was the case of the church in Solona. A report was concluded on this handover-taking action, which included a review of all movable and immovable property of the archpriestship of Surduc (Document 4569, 1940, p. 12). In addition to this report, a convention was concluded on June 9th regarding the rights to parish income from the harvest of land owned by the parish of Surduc, in 1940, which were divided between four people, as follows: a quarter of the parish income, of Surduc and of the church from Solona, belonged to Ambroziu Plaian, the former archpriest. Gheorghe Pop, who was interim administrator in Surduc and Augustin Nechita, interim administrator in Solona, both divided a quarter, and Gavrilă Deac was given the remaining two quarters. Also, the two interims had to take Deac's place until the end of June (Document 4569, 1940, p. 4).

It can be seen that after the appointment, he had to come to the district where he was transferred to take over the archpriestship. The bishop appointed another archpriest to oversee this takeover. The registers, especially the financial ones, were checked, an inventory of the goods was made, and also it was established how the incomes generated by the agricultural lands of the parish in that year are divided. In addition to these bureaucratic issues, a sensitive situation can be represented by, as I have already stated, the way in which the new archpriest is greeted by the parishioners. The fact that the archpriest who retires, or transfers, has the habit

of recommending to the bishop someone to be his successor, especially someone within the archpriestship, can sometimes lead to situations similar to the one in Surduc, a situation that was nevertheless solved by Ștefan Botha, not being subsequent conflicts reported.

The task of administering the Buciumi archpriestship did not end for Gavrilă Deac on 9th June, and even though in the chapter meeting that took place on 13rd June it was established that Emil Petran, the priest of Almaș, should be the interim administrator of the archpriestship, and the priest from Agrij to take over the interim over the church in Buciumi, a permanent successor had not yet been established. Choosing one was certainly not an easy task considering the difficulties in the district.

The board of trustees (a group of regularly elected believers who are responsible for handling most of the financial matters in a parish) of the Buciumi church wrote to Iuliu Hossu shortly after Gavrilă Deac took over the archdiocese of Surduc. In the letter signed by the trustees, they pointed out that they urgently need a new priest, wanting him to be "foreign and unknown to neighboring villages, especially not from Bogdana or Sângeorz" (Document 4568, 1940, p. 1). Moreover, the trustees stated that the urgency of finding a priest was due to the fact that during the period when Gavrilă Deac had been archpriest in Buciumi, the number of Orthodox believers converted to Greek Catholicism had increased, but once he announced his transfer to Surduc, many of the laity converted to Orthodoxy again. The letter also pointed out that the Orthodox priest presented in the negative way the departure of Deac, characterized it as an abandonment of the parishioners. Taking into account all these consequences of the archpriest's departure, the trustees wanted a priest similar to Gavrilă Deac, an archpriest to thwart confessional changes and to keep the Greek Catholic community united (Document 4568, 1940, p. 1).

The concern of the laity from Buciumi towards the implications generated by Deac's departure was brought to light, and one of their main fears was that a possible successor could be Victor Răcășan, the priest from Bogdana, who was involved in several conflicts and financial irregularities. However, Victor Răcășan did not submit his file in order to be appointed archpriest, moreover, he had even asked the bishop to be transferred from the archpriestship of Buciumi, to a small parish near his native village (Document 4851, 1940, pg. 1-2).

There were several priests interested in taking over the leadership of this archpriestship located at the edge of the Greek-Catholic Diocese of Cluj-Gherla. Therefore, in the following paragraphs of this paper, those who were recorded in the archives of the diocese that they sent their files will be mentioned. From a chronological point of view, the priest Augustin Farcașiu from Fundătura was the first to submit his documents for appointment, on May 23rd. His motivation focused in particular on the material aspects and the need to be in a parish that would bring a higher income through which to support his family (Document 5209, 1940, p. 1). Augustin Farcașiu's file does not currently exist in the archives, but the information regarding the file can be found in a letter issued by the priest on July 15th, (a few days after the appointment of the archpriest was decided), Augustin Farcașiu expressing his dissatisfaction related to the fact that he had not been elected.

The next person who asked for the appointment was the priest from Feiurdeni, who stated on June 14 that he had already made two more requests since the publication of the announcement, and did not receive an answer. In his motivation, the priest claimed that he knows about the problems of Buciumi district, he mentioned that he also had several difficulties in his own parish in previous years, but he managed to overcome them, so he considers himself qualified for such situations (Document 4625, 1940, p. 1).

On June 15, Ștefan Răcășan, parish priest of Sâncraiu Almașului, also submitted his application. He also claimed that he was familiar with the problems in Buciumi, he said that he also had to deal with problems related to the transition from one denomination to another in

his own parish. He gave the example of 12 families of Baptists that he managed to persuade to return to Greek Catholicism (Document 5832, 1940, p. 10). Last but not least, Ștefan Răcășan highlighted in the letter the cultural aspects that he considers to qualify him to be named archpriest: his involvement in religious publications, the organization of a choir that performed both on pilgrimages to the Nicula monastery and at events in the presence of the apostolic nuncio, Andrea Cassulo (Document 5832, 1940, p. 11). The construction of the arguments of his motivation was really well thought out, the priest leaving the material aspects at the end.

The last file recorded that was submitted for appointment as archpriest of Buciumi district, was on July 9th, and it belonged to Emil Petran, parish priest in Almaș. In his letter, he stated that he does not ask to be named out of vanity, nor does he have any material interest, having a good financial situation. He mentioned instead that he is from a family of priests who administered Almaș parish responsibly for generations. Moreover, he was appointed a priest 3 decades ago, claiming that experience qualifies him for the duties that the new position would bring (Document 5099, 1940, p. 1).

The decision regarding the appointment of the archpriest of Buciumi district was taken during the consistory meeting of July 11, but meanwhile Gavrilă Deac had to leave Buciumi and go to Surduc, starting in July, because he benefited from the help of the interims there only until the end of June. For this reason, both the parish of Buciumi and the administration of the district were entrusted to the interims recommended by the former archpriest.

Therefore, on July 2nd, Deac was absolved of the management of the Buciumi archpriestship, and the official handover was made. Also, a report was made, in which the goods (movable and immovable) and other specifications regarding the church properties were highlighted. It is worth mentioning that in such acts a clear distinction is made between the goods that were purchased from the church funds, and which were purchased by the priest from his own money. Thus, Gavrilă Deac had the right to take with him those goods that belonged to him: the mosaic tiles from the oven in the parish house, the roses he had planted (he had the right to return in the fall to get them out of the ground), as well as the harvest from the garden he worked on (Document 35, p. 180).

Starting with July 2, the responsibility for the administration of the archpriestship officially falls to the priest Emil Petran, who was also the notary of the district, while Ioachim Maxim had to take care of the parish. However, the interim was short-lived, only until July 21. Even if it was not stipulated when the bishop was going to announce the appointment of the new archpriest in "Curierul Creștin", it is not difficult to understand that Iuliu Hossu took into account the difficulties and challenges of the Buciumi district, so an interim administration was not indicated, being necessary an archpriest to continue what Gavrilă Deac had started in 1938, and very important, to reassure the trustees who had written to him very worried about the confessional changes.

Therefore, the announcement appeared in issue 13 of the diocesan newspaper stating that: "Ștefan Răcășan, former parish priest of Sâncraiuului Almașului, Cluj-Mănăstur district, upon request, is appointed archpriest of Buciumi district in the July 11 meeting" (Curierul Creștin nr. 13, 1940, p. 102). The arrival of the new archpriest in Buciumi involved an issue that constantly arose when a priest changed his parish: the costs of moving, if it is a considerable distance between parishes, were not small, so the priest in question resorted to request a salary advance. If in the case of Gavrilă Deac such a request was not necessary, Ștefan Răcășan addressed Iuliu Hossu on July 12, requesting an advance of 15,000 lei. Such salary advances were common, and the system of restitution was established between the priest and the bishop depending on how high were both the amount of the advance and the salary of the one who asked for the money. In this case, the refund was set to be made in monthly installments of 2000 lei, starting the following month, August (Document 5126, 1940, p. 1),

and an interest rate of 5% was charged, a percentage that was standard for all these advance payments.

Receiving the necessary money for the move, Ștefan Răcășan filled the vacancy in Buciumi on July 21st when he officially took over the parish and the district administration. Gavrilă Deac had to return to his former residence, because he was the one delegated by the bishop to invest the new archpriest in office. The necessary documents were made: a report of the property, the certificate of takeover the archpriestship, as well as an agreement regarding the distribution of income between the priests who had administered to the parish in that year (Document 35, p. 182).

The agreement signed on July 21st on the distribution of income should not be confused with the act issued on July 2nd which mentioned the goods that Gavrilă Deac had the right to take with him when leaving for Surduc. At the time of handing over the archpriestship to the interim administration, it was established only which were those objects that were in the personal property of Deac, in order to be taken, and which belonged to the church. At that time, however, it was not fixed how the 1940 harvest generated by the church lands would be divided. Such agreements ended only when the successor of the former archpriest officially took the office, as it happened in the case of the archdiocese of Surduc: Ambroziu Plaian retired and was absolved of the administration at the end of March, but the way to divide the crops had been established only in June, when Gavrilă Deac took over the district.

The interim being a very short one -19 days- it was established that the division of the harvest should be done only in two parts, between Deac and Răcășan, and the new archpriest had to pay Ioachim Maxim the amount of 600 lei. Also, Ștefan Răcășan had to pay Gavrilă Deac the amount of 400 lei for the clover seed (Document 5832, 1940, p. 2), given the fact that the harvest was to be entirely his, in the following year.

Therefore, the last official action taken by Gavrilă Deac in the Buciumi archpriestship took place on July 21st, more than two months after it was announced that his transfer to Surduc had been approved. This aspect reveals the numerous implications of a transfer and appointment of a new archpriest.

## **Conclusion**

In conclusion, the occupation of a vacant archpriestship on the territory of the Greek Catholic Diocese of Cluj-Gherla involved some clearly established stages, to which certain particular aspects could be added, depending on the specificity of each archpriestship. The vacancies were published in the diocesan newspaper, specifying the deadline by which the files had to be sent, as well as what documents were needed. The election was made during a consistory meeting, the bishop being the one who held the prerogative of appointing the archpriest. Beyond these official provisions, when such an appointment was necessary, local peculiarities were also considered.

At each change related to the administration of an archpriestship, a report was signed in which the assets held were reviewed, and when the issue of succession was solved, a convention was made to determine what share of the church's agricultural production belongs to each party involved: the former archpriest, the new one, as well as the one who took care of the interim administration.

Another important component that had to be taken into account in such appointments or transfers was the reaction of the parishioners. Constant attempts were made to avoid creating tense situations between the diocese and the local communities of believers: Bishop Iuliu Hossu considered the letter of the board of trustees of Buciumi in the detriment of the priest from Almaș, or in contrast to this situation, when the bishop appointed Gavrilă Deac in a archpriestship where some of the faithful wanted an archpriest from the local villages, the

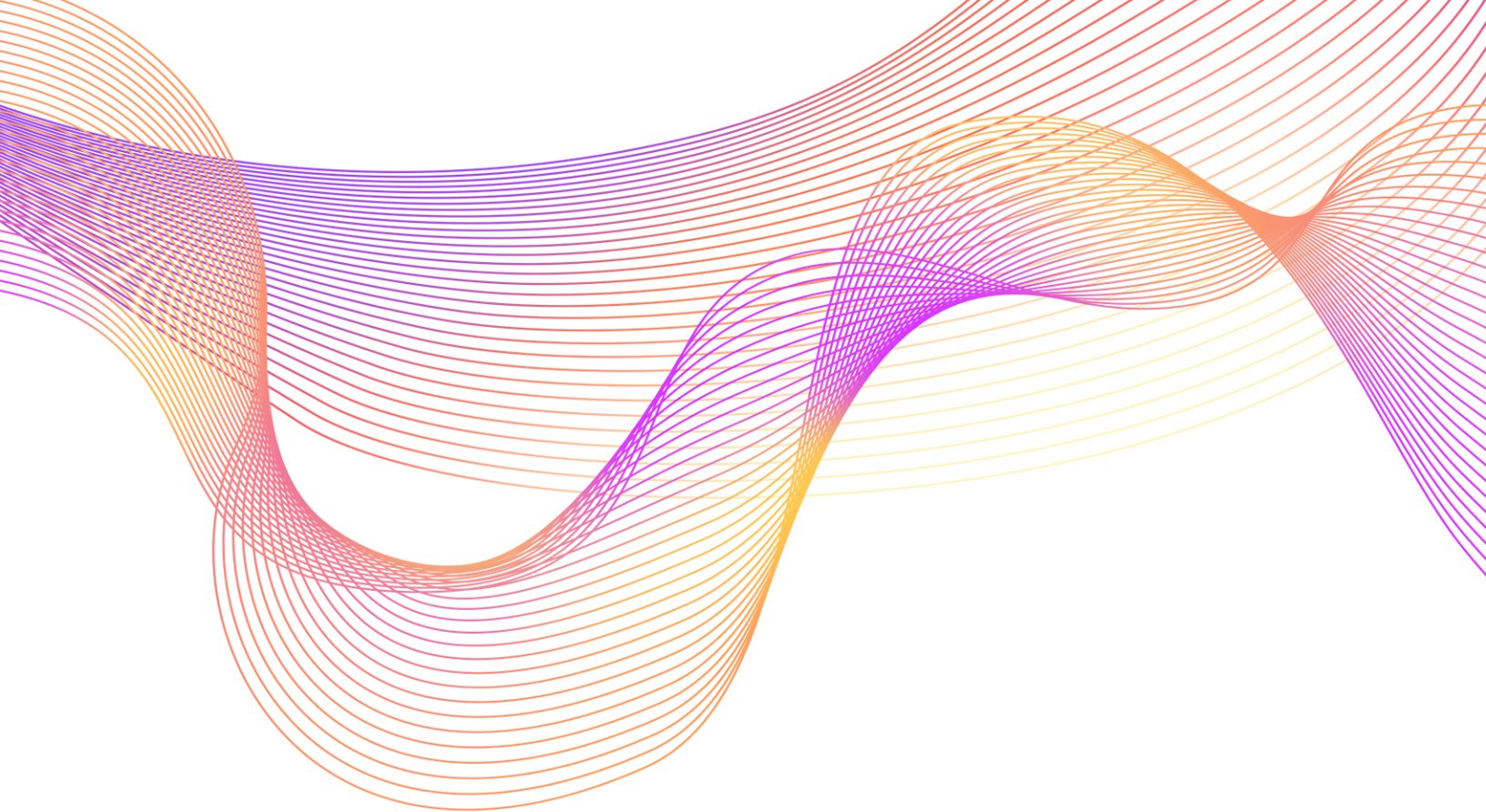
bishop was immediately informed of how the appointment in question was received by the believers.

Due to the fact that the archpriestship institution continued to represent in 1940 the direct link between the bishop and the parishes in the territory, Iuliu Hossu was always thoughtful about the people he appointed to this position in order to ensure the most efficient administration of the diocese.

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